



**Retail Site  
Assessment**  
December 2008



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## Selecting Maricopa's Retail Site

To begin the CommunityID process, the City of Maricopa, AZ selected three sites to be analyzed for possible retail development or revitalization. The locations of the three sites are shown on the next page.

**The next task for the sponsoring organization is to select one of the three sites for a more detailed analysis and determination of retail firms that will best match the consumers in Maricopa's trade areas.**

To more fully understand the retail potential of Maricopa, Buxton conducted the following analyses:

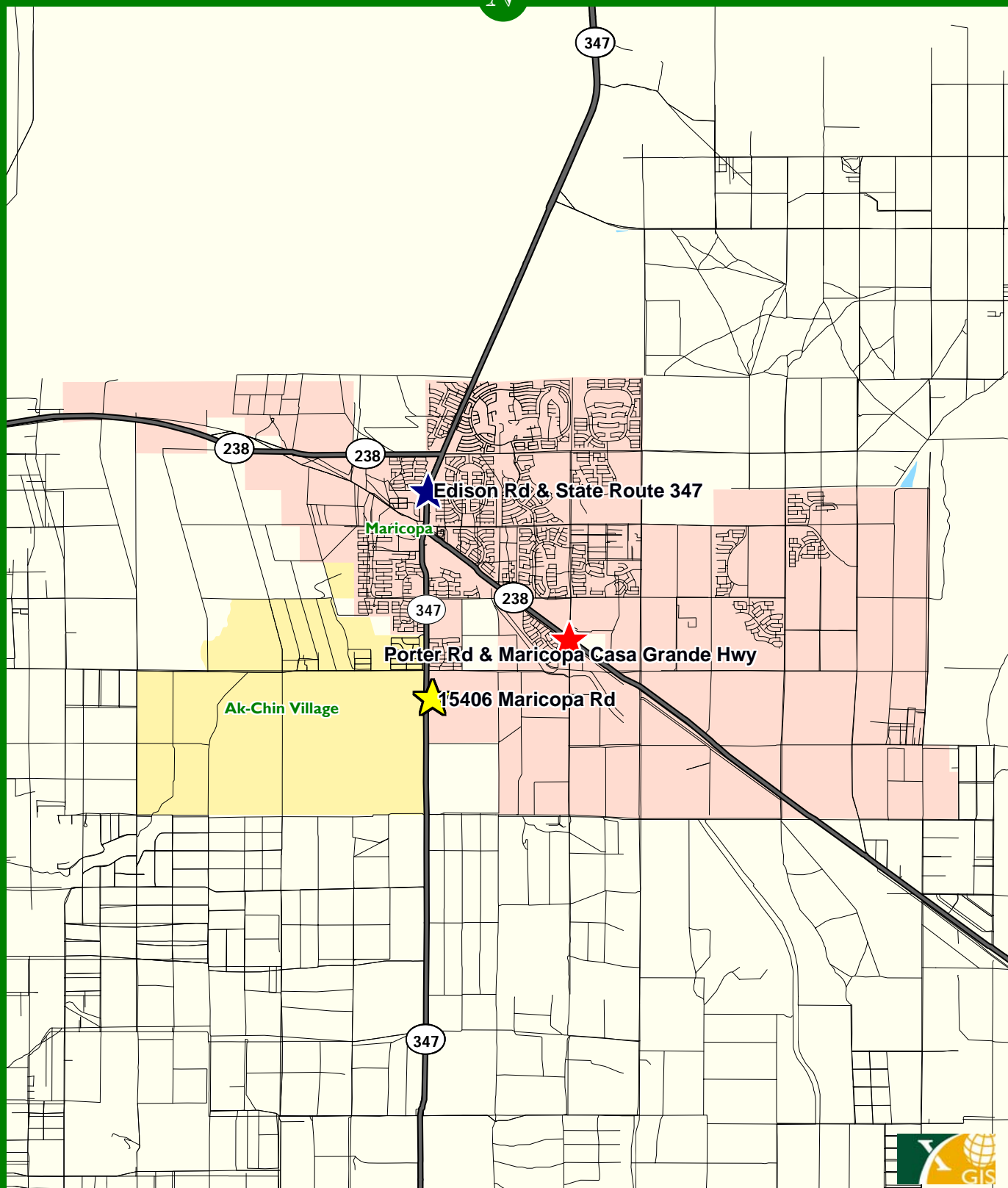
- A fifteen minute drive-time trade area was delineated for each site
- The households in each trade area were segmented according to buying habits and lifestyles
- A profile of Maricopa's customers within each of the trade areas was developed
- The surplus and leakage for more than 36 product types and 74 store types was determined for each potential trade area

The purpose of these analyses is to develop Maricopa's Customer Profile. The Customer Profile is a snapshot of the customers that reside in Maricopa's trade areas. Even though these consumers are complex and diverse, Buxton is able to capture and catalogue the extent to which potential demand for retailer's goods and services are concentrated in the trade area.

By overlaying Maricopa's Customer Profile with over 4,500 retail matching profiles in Buxton's proprietary database, we are able to identify major categories of retail that are candidates for location in Maricopa. This matching provides the basis for determining Maricopa's viability to attract retailers and restaurants and forms the basis for Buxton's recommendations and conclusions.

With this analysis, the City of Maricopa, AZ can make a more informed decision about investments in infrastructure and can focus resources on areas of higher retail development potential.

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## Maricopa, Arizona: Overview



### Shopping Centers

GLA in thousands



1000+



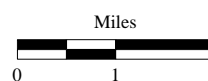
500 to 1000

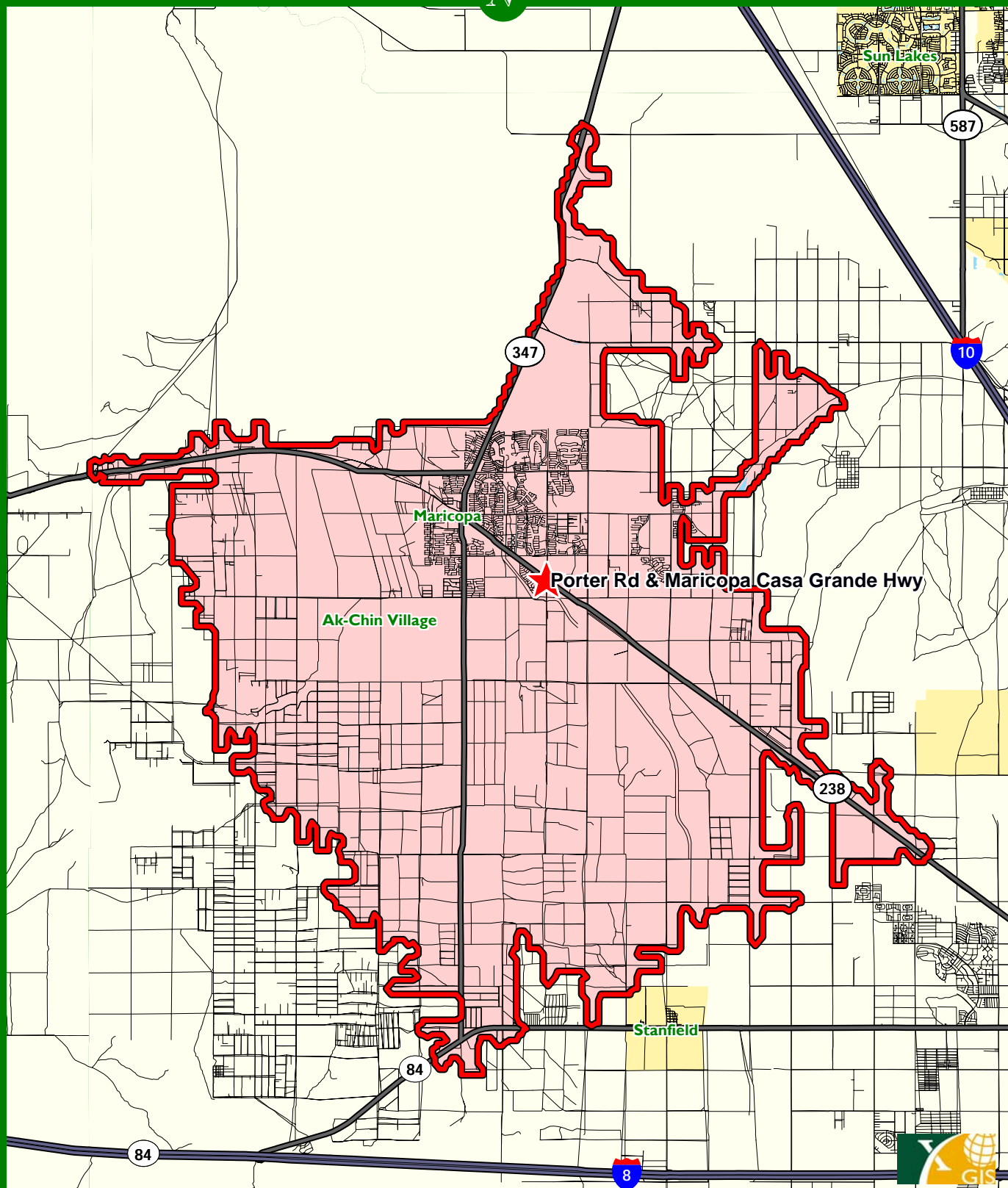
City Limits

Site 1

Site 2

Site 3





## Maricopa, Arizona: Trade Area

CITY OF  
**MARICOPA**  
Proud History - Promising Future



### Shopping Centers

GLA in thousands

1000+

500 to 1000

15 Minute Drive Time

★ Site 1

Miles



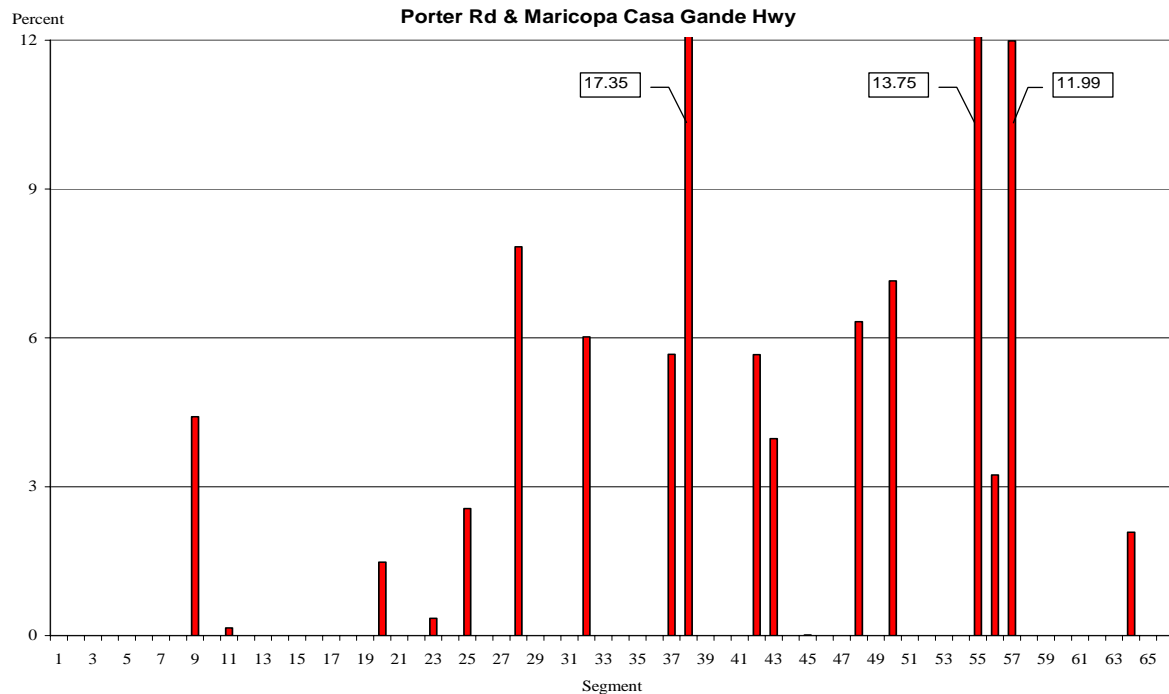
## Site I Analysis: Porter Rd & Maricopa Casa Grande Hwy

### Drive-Time Trade Area

The map on the opposite page depicts the 15-minute trade area for Site I. The trade area was determined by Buxton's proprietary drive-time technology.

### Psychographics

The psychographic profile of the households within the 15-minute trade area of Site I is presented below.



Source: Claritas, Inc. PRIZM® NE, © 2008

### Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for Site I.

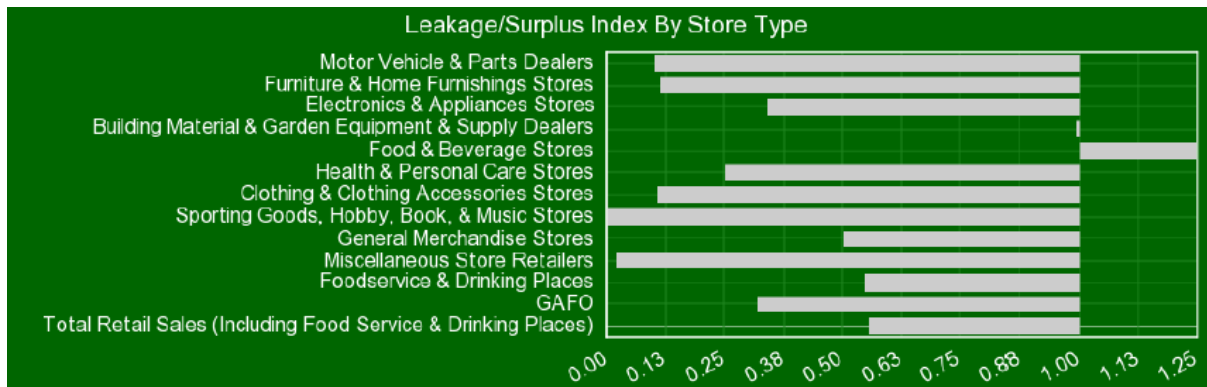
Dominant Segments	Description	Households	% of All Households
9	Big Fish, Small Pond	601	4.41
28	Traditional Times	1067	7.83
32	New Homesteaders	820	6.02
37	Mayberry-ville	772	5.67
38	Simple Pleasures	2363	17.35
42	Red, White & Blues	771	5.66
43	Heartlanders	541	3.97
48	Young & Rustic	861	6.33
50	Kid Country, USA	974	7.15
55	Golden Ponds	1872	13.75
56	Crossroads Villagers	441	3.24
57	Old Milltowns	1633	11.99

Source: Claritas, Inc. PRIZM® NE, © 2008

## Site I Analysis (continued)

### Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



\*GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies

Source: Claritas, Inc, RETAIL MARKET POWER, © 2008

The following table presents the trade potential variables for Site I:

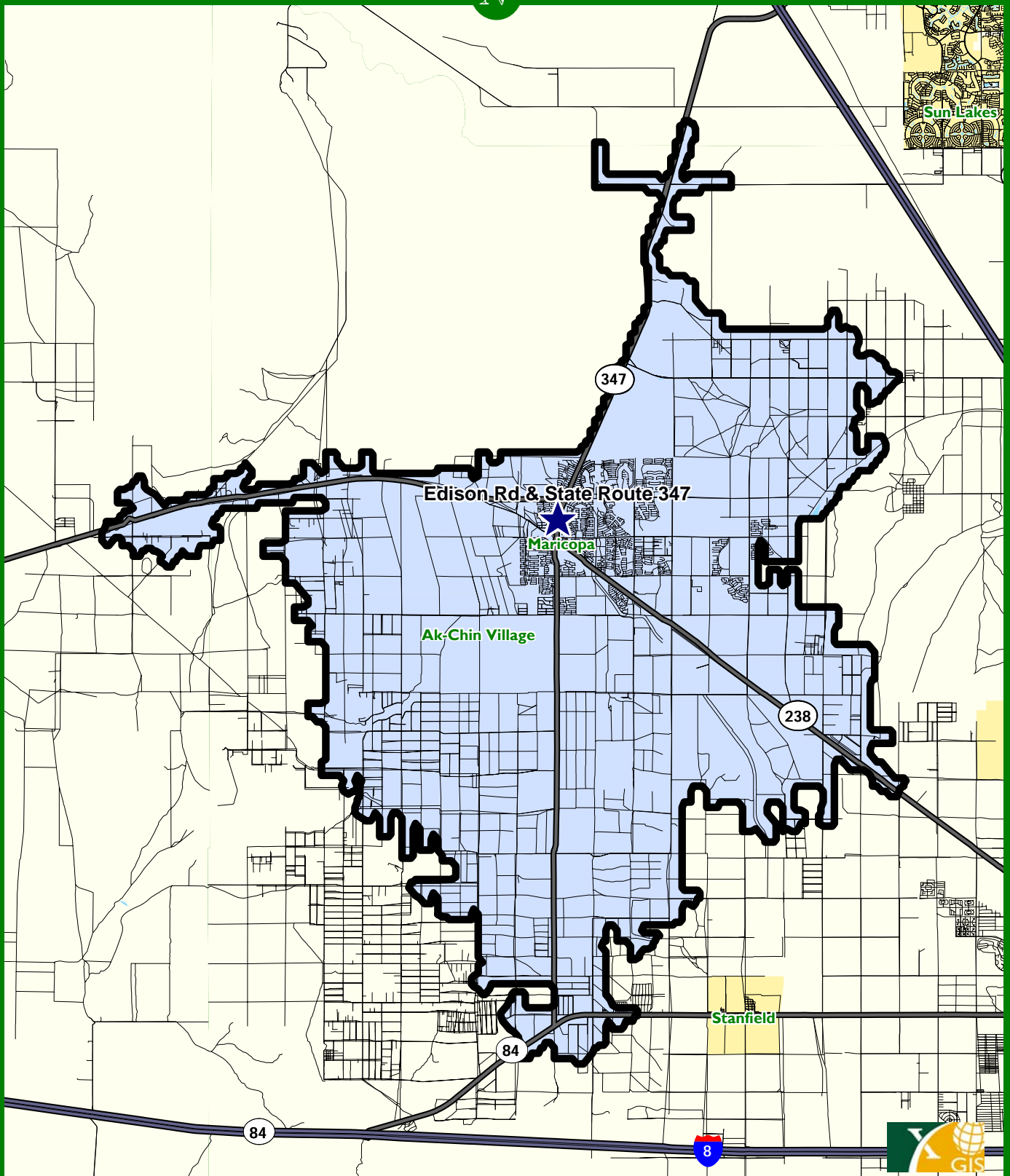
Trade Potential Variables	Site I
Estimated Household Count	13,619
Number of Households in Dominant Segments	12,715
Traffic Count	10,528
Total Demand	\$129,010,796
Actual Sales	\$71,972,258
Leakage/Surplus	\$57,038,538

Source: Claritas, Inc, RETAIL MARKET POWER, © 2008





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## Maricopa, Arizona: Trade Area

CITY OF  
**MARICOPA**  
PRIDE IN HISTORY - PROGRESS FOR THE FUTURE

 **CommunityID**

### Shopping Centers

GLA in thousands

1000+

500 to 1000

 15 Minute Drive Time

★ Site 2

Miles



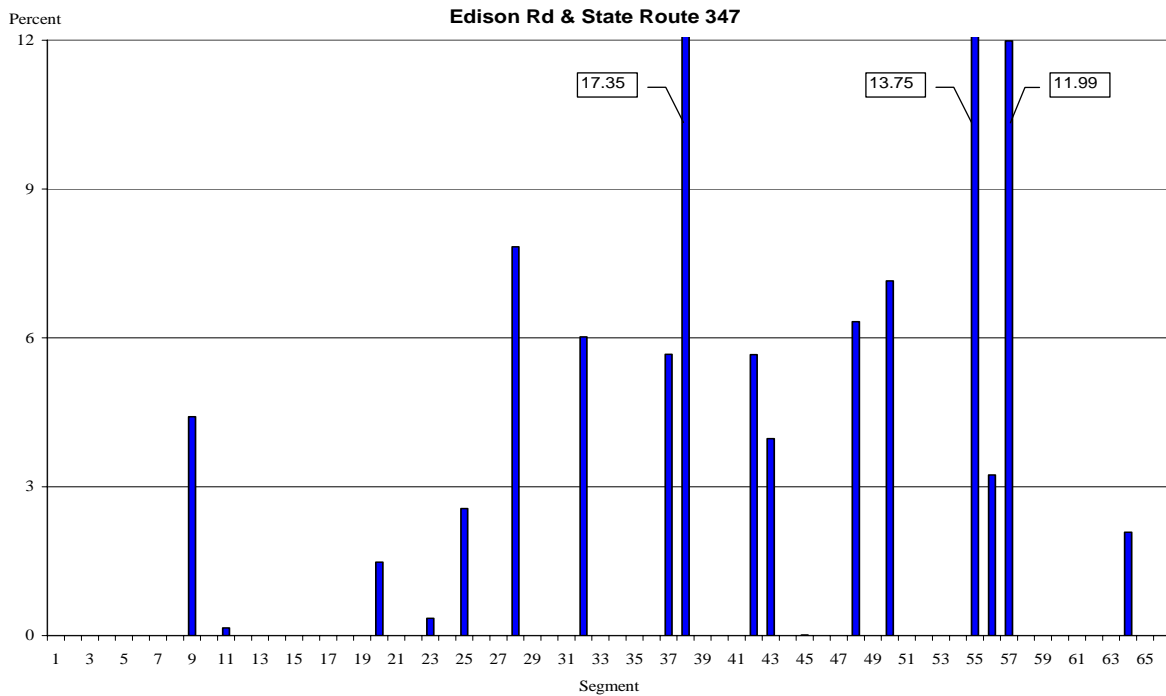
## Site 2 Analysis: Edison Rd & State Route 347

### Drive-Time Trade Area

The map on the opposite page depicts the 15-minute trade area for Site 2. The trade area was determined by Buxton's proprietary drive-time technology.

### Psychographics

The psychographic profile of the households within the 15-minute trade area of Site 2 is presented below.



Source: Claritas, Inc. PRIZM® NE, © 2008

### Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for Site 2.

Dominant Segments	Description	Households	% of All Households
9	Big Fish, Small Pond	601	4.41
28	Traditional Times	1067	7.83
32	New Homesteaders	820	6.02
37	Mayberry-ville	772	5.67
38	Simple Pleasures	2363	17.35
42	Red, White & Blues	771	5.66
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55	Golden Ponds	1872	13.75
56	Crossroads Villagers	441	3.24
57	Old Milltowns	1633	11.99

Source: Claritas, Inc. PRIZM® NE, © 2008

## Site 2 Analysis (continued)

### Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



\*GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies

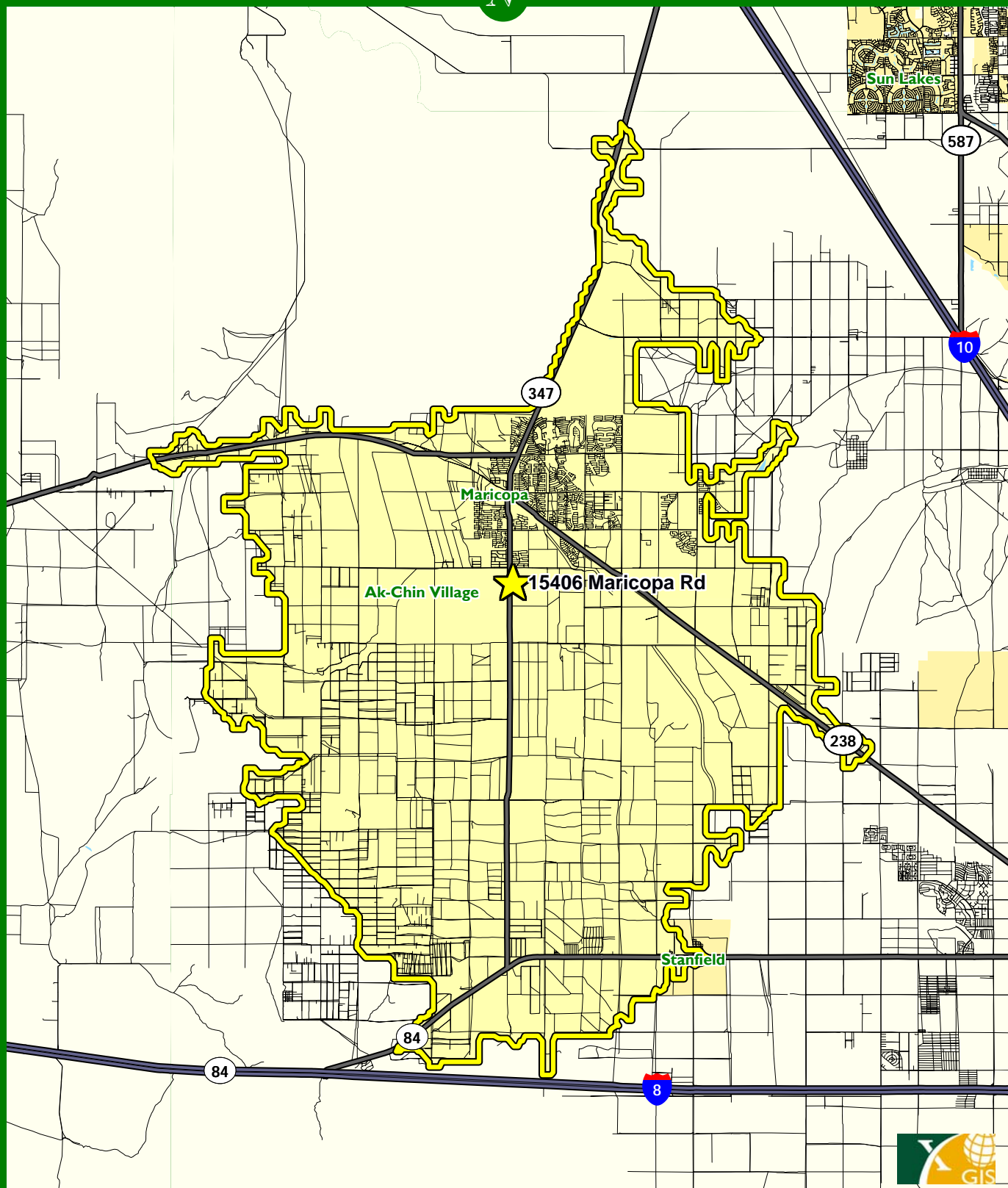
Source: Claritas, Inc, RETAIL MARKET POWER, © 2008

The following table presents the trade potential variables for Site 2:

Trade Potential Variables	Site 2
Estimated Household Count	14,481
Number of Households in Dominant Segments	13,520
Traffic Count	33,547
Total Demand	\$130,621,374
Actual Sales	\$77,400,939
Leakage/Surplus	<b>\$53,220,435</b>

Source: Claritas, Inc, RETAIL MARKET POWER, © 2008,





## Maricopa, Arizona: Trade Area



### Shopping Centers

GLA in thousands



15 Minute Drive Time



Miles



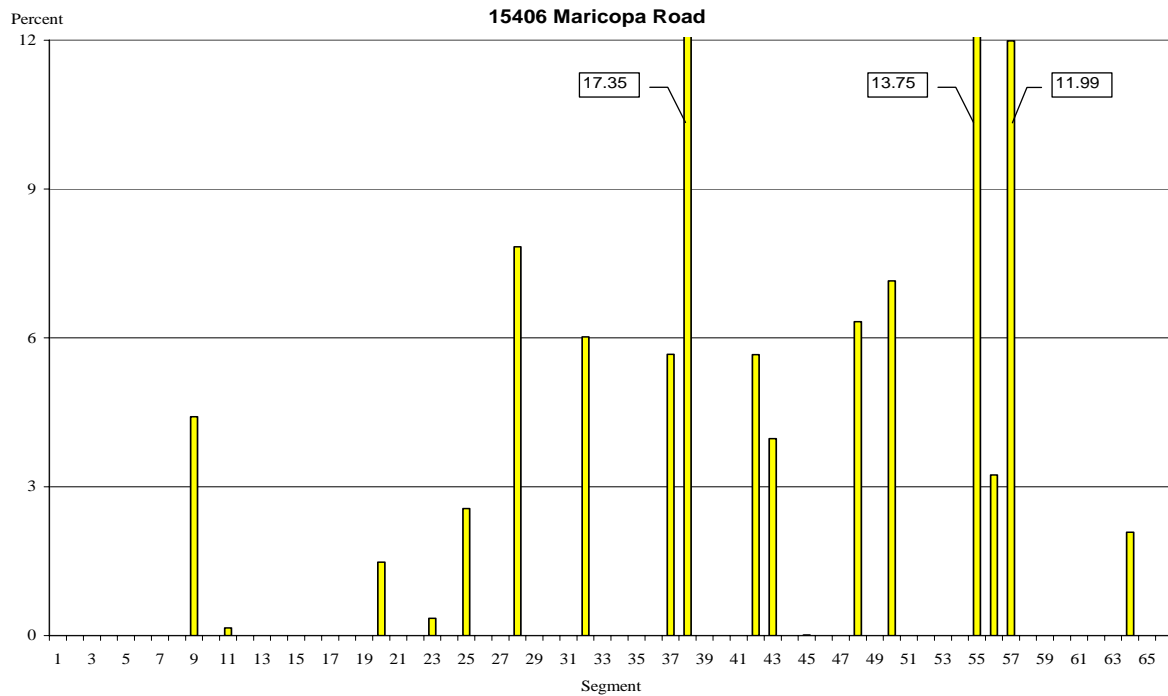
## Site 3 Analysis: 15406 Maricopa Rd

### Drive-Time Trade Area

The map on the opposite page depicts the 15-minute trade area for Site 3. The trade area was determined by Buxton's proprietary drive-time technology.

### Psychographics

The psychographic profile of the households within the 15-minute trade area of Site 3 is presented below.



Source: Claritas, Inc. PRIZM® NE, © 2008

### Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for Site 3.

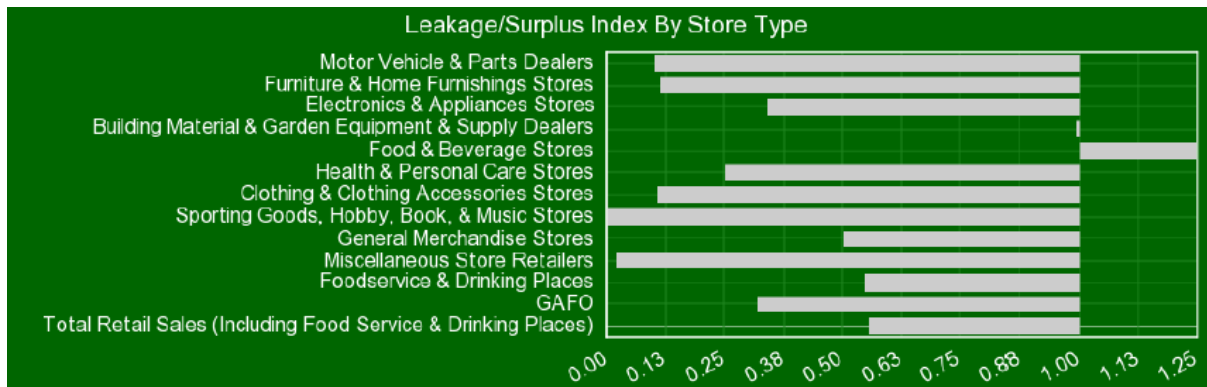
Dominant Segments	Description	Households	% of All Households
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55	Golden Ponds	1872	13.75
56	Crossroads Villagers	441	3.24
57	Old Milltowns	1633	11.99

Source: Claritas, Inc. PRIZM® NE, © 2008

## Site 3 Analysis (continued)

### Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



\*GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies

Source: Claritas, Inc, RETAIL MARKET POWER, © 2008

The following table presents the trade potential variables for Site 3:

Trade Potential Variables	Site 3
Estimated Household Count	13,619
Number of Households in Dominant Segments	12,715
Traffic Count	10,528
Total Demand	\$129,010,796
Actual Sales	\$71,972,258
Leakage/Surplus	<b>\$57,038,538</b>

Source: Claritas, Inc, RETAIL MARKET POWER, © 2008, City of Maricopa, AZ



## Site Comparison

### Trade Area Segmentation

This side by side comparison of the three trade areas shows the compositions and characteristics of the households to be very similar. This is not unusual and can be expected in an area with potential sites in close proximity.

Trade Potential Variables	Site 1	Site 2	Site 3
Estimated Household Count	13,619	14,481	13,619
Number of Households in Dominant Segments	12,715	13,520	12,715
Traffic Count	6,725	33,547	10,528
Total Demand	\$129,010,796	\$130,621,374	\$129,010,796
Total Supply	\$71,972,258	\$77,400,939	\$71,972,258
Leakage/Surplus	\$57,038,538	\$53,220,435	\$57,038,538

Source: Claritas, Inc, RETAIL MARKET POWER, PRIZM® NE, © 2008



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## Brief Segment Descriptions

- 1 **UPPER CRUST** – The nation’s most exclusive address, Upper Crust is the wealthiest lifestyle in America—a haven for empty-nesting couples over 55 years old. No segment has a higher concentration of residents earning over \$200,000 a year or possessing a postgraduate degree, and none has a more opulent standard of living.
- 2 **BLUE BLOOD ESTATES** – Blue Blood Estates is a family portrait of suburban wealth, a place of million-dollar homes and manicured lawns, high-end cars and exclusive private clubs. The nation’s second-wealthiest lifestyle, it is characterized by married couples with children, college degrees, a significant percentage of Asian Americans and six-figure incomes earned by business executives, managers and professionals.
- 3 **MOVERS & SHAKERS** – Movers & Shakers is home to America’s up-and-coming business class: a wealthy suburban world of dual-income couples who are highly educated, typically between the ages of 35 and 54, often with children. Given its high percentage of executives and white-collar professionals, there is a decided business bent to this segment: Movers & Shakers rank number one for owning a small business and having a home office.
- 4 **YOUNG DIGERATI** – Young Digerati are the nation’s tech-savvy singles and couples living in fashionable neighborhoods on the urban fringe. Affluent, highly educated and ethnically mixed, Young Digerati communities are typically filled with trendy apartments and condos, fitness clubs and clothing boutiques, casual restaurants and all types of bars—from juice to coffee to microbrew.
- 5 **COUNTRY SQUIRES** – The wealthiest residents in exurban America live in Country Squires, an oasis for affluent Baby Boomers who have fled the city for the charms of small-town living. In their bucolic communities noted for their recently built homes on sprawling properties, the families of executives live in six-figure comfort. Country Squires enjoy country club sports like golf, tennis and swimming as well as skiing, boating and biking.
- 6 **WINNER’S CIRCLE** – Among the wealthy suburban lifestyles, Winner’s Circle is the youngest, a collection of mostly 25- to 34-year-old couples with large families in new-money subdivisions. Surrounding their homes are the signs of upscale living: recreational parks, golf courses and upscale malls. With a median income of nearly \$90,000, Winner’s Circle residents are big spenders who like to travel, ski, go out to eat, shop at clothing boutiques and take in a show.
- 7 **MONEY & BRAINS** – The residents of Money & Brains seem to have it all: high incomes, advanced degrees and sophisticated tastes to match their credentials. Many of these city dwellers—predominantly white with a high concentration of Asian Americans—are married couples with few children who live in fashionable homes on small, manicured lots.

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## Brief Segment Descriptions

- 8 **EXECUTIVE SUITES** – Executive Suites consists of upper-middle-class singles and couples typically living just beyond the nation’s beltways. Filled with significant numbers of Asian Americans and college graduates—both groups are represented at more than twice the national average—this segment is a haven for white-collar professionals drawn to comfortable homes and apartments within a manageable commute to downtown jobs, restaurants and entertainment.
- 9 **BIG FISH, SMALL POND** – Older, upper-class, college-educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, belonging to country clubs, maintaining large investment portfolios and spending freely on computer technology.
- 10 **SECOND CITY ELITE** – There’s money to be found in the nation’s smaller cities, and you’re most likely to find it in Second City Elite. The residents of these satellite cities tend to be prosperous executives who decorate their \$200,000 homes with multiple computers, large-screen TV sets and an impressive collection of wines. With more than half holding college degrees, Second City Elite residents enjoy cultural activities—from reading books to attending theater and dance productions.
- 11 **GOD’S COUNTRY** – When city dwellers and suburbanites began moving to the country in the 1970’s, God’s Country emerged as the most affluent of the nation’s exurban lifestyles. Today, wealthier communities exist in the hinterlands, but God’s Country remains a haven for upper-income couples in spacious homes. Typically college-educated Baby Boomers, these Americans try to maintain a balanced lifestyle between high-power jobs and laid-back leisure.
- 12 **BRITE LITES, LI’L CITY** – Not all of the America’s chic sophisticates live in major metros. Brite Lights, Li’l City is a group of well-off, middle-aged couples settled in the nation’s satellite cities. Residents of these typical double income, no kids households have college educations, well-paying business and professional careers and swank homes filled with the latest technology.
- 13 **UPWARD BOUND** – More than any other segment, Upward Bound appears to be the home of those legendary Soccer Moms and Dads. In these small satellite cities, upper-class families boast dual incomes, college degrees and new split-levels and colonials. Residents of Upward Bound tend to be kid-obsessed, with heavy purchases of computers, action figures, dolls, board games, bicycles and camping equipment.
- 14 **NEW EMPTY NESTS** – With their grown-up children recently out of the house, New Empty Nests is composed of upscale older Americans who pursue active—and activist—lifestyles. Nearly three-quarters of residents are over 65 years old, but they show no interest in a rest-home retirement. This is the top-ranked segment for all-inclusive travel packages; the favorite destination is Italy.

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## Brief Segment Descriptions

- 15 **POOLS & PATIOS** – Formed during the postwar Baby Boom, Pools & Patios has evolved from a segment of young suburban families to one for mature, empty-nesting couples. In these stable neighborhoods graced with backyard pools and patios—the highest proportion of homes were built in the 1960’s—residents work as white-collar managers and professionals, and are now at the top of their careers.
- 16 **BOHEMIAN MIX** – A collection of young, mobile urbanites, Bohemian Mix represents the nation’s most liberal lifestyles. Its residents are a progressive mix of young singles and couples, students and professionals, Hispanics, Asians, African-Americans and whites. In their funky row houses and apartments, Bohemian Mixers are the early adopters who are quick to check out the latest movie, nightclub, laptop and microbrew.
- 17 **BELTWAY BOOMERS** – The members of the postwar Baby Boom are all grown up. Today, these Americans are in their forties and fifties, and one segment of this huge cohort—college-educated, upper-middle-class and home-owning—is found in Beltway Boomers. Like many of their peers who married late, these Boomers are still raising children in comfortable suburban subdivisions, and they’re pursuing kid-centered lifestyles.
- 18 **KIDS & CUL-DE-SACS** – Upscale, suburban, married couples with children is the description of Kids & Cul-de-Sacs, an enviable lifestyle of large families in recently built subdivisions. With a high rate of Hispanic and Asian Americans, this segment is a refuge for college-educated, white-collar professionals with administrative jobs and upper-middle-class incomes. Their nexus of education, affluence and children translates into large outlays for child-centered products and services.
- 19 **HOME SWEET HOME** – Widely scattered across the nation’s suburbs, the residents of Home Sweet Home tend to be upper-middle-class married couples living in mid-sized homes with few children. The adults in the segment, mostly between the ages of 25 and 54, have gone to college and hold professional and white-collar jobs. With their upscale incomes and small families, these folks have fashioned comfortable lifestyles, filling their homes with toys, TV sets and pets.
- 20 **FAST-TRACK FAMILIES** – With their upper-middle-class incomes, numerous children and spacious homes, Fast-Track Families are in their prime acquisition years. These middle-aged parents have the disposable income and educated sensibility to want the best for their children. They buy the latest technology with impunity: new computers, DVD players, home theater systems and video games. They take advantage of their rustic locales by camping, boating and fishing.

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## Brief Segment Descriptions

- 21 **GRAY POWER** – The steady rise of older, healthier Americans over the past decade has produced one important by-product: middle-class, home-owning suburbanites who are aging in place rather than moving to retirement communities. A segment of older, mid-scale singles and couples who live in quiet comfort, Gray Power reflects this trend.
- 22 **YOUNG INFLUENTIALS** – Once known as the home of the nation’s yuppies, Young Influentials reflects the fading glow of acquisitive yuppiedom. Today, the segment is a common address for young, middle-class singles and couples who are more preoccupied with balancing work and leisure pursuits. Having recently left college dorms, they now live in apartment complexes surrounded by ball fields, health clubs and casual-dining restaurants.
- 23 **GREENBELT SPORTS** – A segment of middle-class exurban couples, Greenbelt Sports is known for its active lifestyle. Most of these middle-aged residents are married, college-educated and own new homes; about a third have children. And few segments have higher rates for pursuing outdoor activities such as skiing, canoeing, backpacking, boating and mountain biking.
- 24 **UP-AND-COMERS** – Up-and-Comers is a stopover for young, mid-scale singles before they marry, have families and establish more deskbound lifestyles. Found in second-tier cities, these mobile twenty-somethings include a disproportionate number of recent college graduates who are into athletic activities, the latest technology and nightlife entertainment.
- 25 **COUNTRY CASUALS** – There’s a laid-back atmosphere in Country Casuals, a collection of middle-aged, upper-middle-class households that have started to empty-nest. Workers here—and most households boast two earners—have well-paying blue- or white-collar jobs, or own small businesses. Today these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares and going out to eat.
- 26 **THE COSMOPOLITANS** – Educated, mid-scale and multi-ethnic, The Cosmopolitans are urbane couples in America’s fast-growing cities. Concentrated in a handful of metros—such as Las Vegas, Miami and Albuquerque—these households feature older home-owners, empty-nesters and college graduates. A vibrant social scene surrounds their older homes and apartments, and residents love the nightlife and enjoy leisure-intensive lifestyles.
- 27 **MIDDLEBURG MANAGERS** – Middleburg Managers arose when empty-nesters settled in satellite communities which offered a lower cost of living and more relaxed pace. Today segment residents tend to be middle-class and over 55 years old with solid managerial jobs and comfortable retirements. In their older homes, they enjoy reading, playing musical instruments, indoor gardening and refinishing furniture.

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## Brief Segment Descriptions

- 28 **TRADITIONAL TIMES** – Traditional Times is the kind of lifestyle where small-town couples nearing retirement are beginning to enjoy their first empty-nest years. Typically in their fifties and sixties, these middle-class Americans pursue a kind of granola-and-grits lifestyle. On their coffee tables are magazines with titles ranging from *Country Living* and *Country Home* to *Gourmet* and *Forbes*. But they're big travelers, especially in recreational vehicles and campers.
- 29 **AMERICAN DREAMS** – American Dreams is a living example of how ethnically diverse the nation has become: more than half the residents are Hispanic, Asian or African-American. In these multilingual neighborhoods—one in ten residents speaks a language other than English—middle-aged immigrants and their children live in middle-class comfort.
- 30 **SUBURBAN SPRAWL** – Suburban Sprawl is an unusual American lifestyle: a collection of mid-scale, middle-aged singles and couples living in the heart of suburbia. Typically members of the Baby Boom generation, they hold decent jobs, own older homes and condos, and pursue conservative versions of the American Dream. Among their favorite activities are jogging on treadmills, playing trivia games and renting videos.
- 31 **URBAN ACHIEVERS** – Concentrated in the nation's port cities, Urban Achievers is often the first stop for up-and-coming immigrants from Asia, South America and Europe. These young singles and couples are typically college-educated and ethnically diverse: about a third are foreign-born, and even more speak a language other than English.
- 32 **NEW HOMESTEADERS** – Young, middle-class families seeking to escape suburban sprawl find refuge in New Homesteaders, a collection of small rustic townships filled with new ranches and Cape Cods. With decent-paying jobs in white-collar and service industries, these dual-income couples have fashioned comfortable, child-centered lifestyles, their driveways filled with campers and powerboats, their family rooms with PlayStations and Game Boys.
- 33 **BIG SKY FAMILIES** – Scattered in placid towns across the American heartland, Big Sky Families is a segment of young rural families who have turned high school educations and blue-collar jobs into busy, middle-class lifestyles. Residents like to play baseball, basketball and volleyball in addition to going fishing, hunting and horseback riding. To entertain their sprawling families, they buy virtually every piece of sporting equipment on the market.
- 34 **WHITE PICKET FENCES** – Midpoint on the socioeconomic ladder, residents in White Picket Fences look a lot like the stereotypical American household of a generation ago: young, middle-class, married with children. But the current version is characterized by modest homes and ethnic diversity—including a disproportionate number of Hispanics and African-Americans.

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## Brief Segment Descriptions

- 35 **BOOMTOWN SINGLES** – Affordable housing, abundant entry-level jobs and a thriving singles scene— all have given rise to the Boomtown Singles segment in fast-growing satellite cities. Young, single and working-class, these residents pursue active lifestyles amid sprawling apartment complexes, bars, convenience stores and laundromats.
- 36 **BLUE-CHIP BLUES** – Blue-Chip Blues is known as a comfortable lifestyle for young, sprawling families with well-paying blue-collar jobs. Ethnically diverse—with a significant presence of Hispanics and African-Americans—the segment’s aging neighborhoods feature compact, modestly priced homes surrounded by commercial centers that cater to child-filled households.
- 37 **MAYBERRY-VILLE** – Like the old Andy Griffith Show set in a quaint picturesque berg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, middle-class couples and families like to fish and hunt during the day, and stay home and watch TV at night. With lucrative blue-collar jobs and moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles and pickup trucks.
- 38 **SIMPLE PLEASURES** – With more than two-thirds of its residents over 65 years old, Simple Pleasures is mostly a retirement lifestyle: a neighborhood of lower-middle-class singles and couples living in modestly priced homes. Many are high school-educated seniors who held blue-collar jobs before their retirement, and a disproportionate number served in the military; no segment has more members of veterans clubs.
- 39 **DOMESTIC DUOS** – Domestic Duos represents a middle-class mix of mainly over-55 singles and married couples living in older suburban homes. With their high-school educations and fixed incomes, segment residents maintain an easy-going lifestyle. Residents like to socialize by going bowling, seeing a play, meeting at the local fraternal order or going out to eat.
- 40 **CLOSE-IN COUPLES** – Close-In Couples is a group of predominantly African-American couples living in older homes in the urban neighborhoods of mid-sized metros. High school educated and empty nesting, these 55-year-old-plus residents typically live in older city neighborhoods, enjoying secure and comfortable retirements.
- 41 **SUNSET CITY BLUES** – Scattered throughout the older neighborhoods of small cities, Sunset City Blues is a segment of lower-middle-class singles and couples who have retired or are getting close to retirement. These empty-nesters tend to own their homes but have modest educations and incomes. They maintain a low-key lifestyle filled with newspapers and television by day, and family-style restaurants at night.



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## Brief Segment Descriptions

- 42 RED, WHITE & BLUES – The residents of Red, White & Blues typically live in exurban towns rapidly morphing into bedroom suburbs. Their streets feature new fast-food restaurants, and locals have recently celebrated the arrival of chains like Wal-Mart, Radio Shack and Payless Shoes. Middle-aged, high school educated and lower-middle class, these folks tend to have solid, blue-collar jobs in manufacturing, milling and construction.
- 43 HEARTLANDERS – America was once a land of small middle-class towns, which can still be found today among Heartlanders. This widespread segment consists of middle-aged couples with working-class jobs living in sturdy, unpretentious homes. In these communities of small families and empty-nesting couples, Heartlanders pursue a rustic lifestyle where hunting and fishing remain prime leisure activities along with cooking, sewing, camping and boating.
- 44 NEW BEGINNINGS – Filled with young, single adults, New Beginnings is a magnet for adults in transition. Many of its residents are twenty-something singles and couples just starting out on their career paths—or starting over after recent divorces or company transfers. Ethnically diverse—with nearly half its residents Hispanic, Asian or African-American—New Beginnings households tend to have the modest living standards typical of transient apartment dwellers.
- 45 BLUE HIGHWAYS – On maps, blue highways are often two-lane roads that wind through remote stretches of the American landscape. Among lifestyles, Blue Highways is the standout for lower-middle-class couples and families who live in isolated towns and farmsteads. Here, Boomer men like to hunt and fish; the women enjoy sewing and crafts, and everyone looks forward to going out to a country music concert.
- 46 OLD GLORIES – Old Glories are the nation’s downscale suburban retirees, Americans aging in place in older apartment complexes. These racially mixed households often contain widows and widowers living on fixed incomes, and they tend to lead home-centered lifestyles. They’re among the nation’s most ardent television fans, watching game shows, soaps, talk shows and newsmagazines at high rates.
- 47 CITY STARTUPS – In City Startups, young, multi-ethnic singles have settled in neighborhoods filled with cheap apartments and a commercial base of cafés, bars, laundromats and clubs that cater to twenty-somethings. One of the youngest segments in America—with ten times as many college students as the national average—these neighborhoods feature low incomes and high concentrations of Hispanics and African-Americans.

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## Brief Segment Descriptions

- 48 **YOUNG & RUSTIC** – Like the soap opera that inspired its nickname, Young & Rustic is composed of young, restless singles. Unlike the glitzy soap denizens, however, these folks tend to be lower income, high school-educated and live in tiny apartments in the nation’s exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars and dating.
- 49 **AMERICAN CLASSICS** – They may be older, lower-middle class and retired, but the residents of American Classics are still living the American Dream of home ownership. Few segments rank higher in their percentage of home owners, and that fact alone reflects a more comfortable lifestyle for these predominantly white singles and couples with deep ties to their neighborhoods.
- 50 **KID COUNTRY, USA** – Widely scattered throughout the nation’s heartland, Kid Country, USA is a segment dominated by large families living in small towns. Predominantly white with an above-average concentration of Hispanics, these young working-class households include homeowners, renters and military personnel living in base housing; about 20 percent of residents own mobile homes.
- 51 **SHOTGUNS & PICKUPS** – The segment known as Shotguns & Pickups came by its moniker honestly: it scores near the top of all lifestyles for owning hunting rifles and pickup trucks. These Americans tend to be young, working-class couples with large families—more than half have two or more kids—living in small homes and manufactured housing. Nearly a third of residents live in mobile homes, more than any other segment.
- 52 **SUBURBAN PIONEERS** – Suburban Pioneers represents one of the nation’s eclectic lifestyles, a mix of young singles, recently divorced and single parents who have moved into older, inner-ring suburbs. They live in aging homes and garden-style apartment buildings where the jobs are blue-collar and the money is tight. What unites these residents—a diverse mix of whites, Hispanics and African-Americans—is a working-class sensibility and an appreciation for their off-the-beaten-track neighborhoods.
- 53 **MOBILITY BLUES** – Young singles and single parents make their way to Mobility Blues, a segment of working-class neighborhoods in America’s satellite cities. Racially mixed and under 25 years old, these transient Americans tend to have modest lifestyles due to their lower-income blue-collar jobs. Surveys show they excel in going to movies, playing basketball and shooting pool.
- 54 **MULTI-CULTI MOSAIC** – An immigrant gateway community, Multi-Culti Mosaic is the urban home for a mixed populace of younger Hispanic, Asian and African-American singles and families. With nearly a quarter of the residents foreign born, this segment is a Mecca for first-generation Americans who are striving to improve their lower-middle-class status.

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## Brief Segment Descriptions

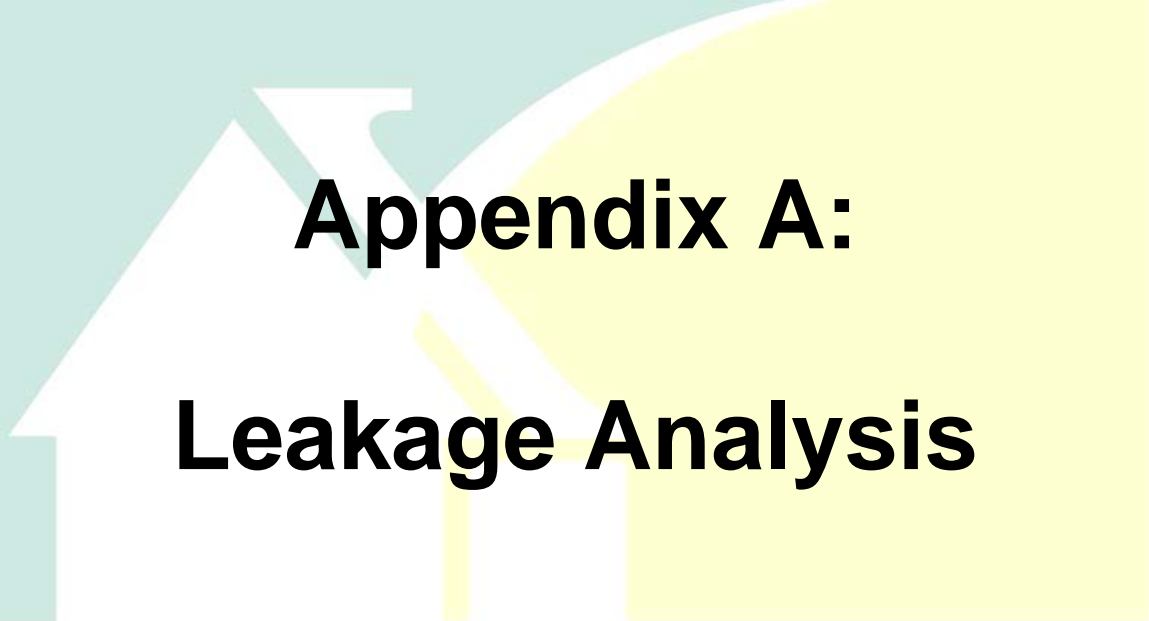
- 55 **GOLDEN PONDS** – Golden Ponds is mostly a retirement lifestyle, dominated by downscale singles and couples over 65 years old. Found in small bucolic towns around the country, these high school-educated seniors live in small apartments on less than \$25,000 a year; one in five resides in a nursing home. For these elderly residents, daily life is often a succession of sedentary activities such as reading, watching TV, playing bingo and doing craft projects.
- 56 **CROSSROADS VILLAGERS** – With a population of middle-aged, blue-collar couples and families, Crossroads Villagers is a classic rural lifestyle. Residents are high school-educated with lower-middle incomes and modest housing; one-quarter live in mobile homes. There's an air of self-reliance in these households as Crossroads Villagers help put food on the table through fishing, gardening and hunting.
- 57 **OLD MILLTOWNS** – America's once-thriving mining and manufacturing towns have aged—as have the residents in Old Milltowns communities. Today, the majority of residents are retired singles and couples living on downscale incomes in pre-1960 homes and apartments. For leisure they enjoy gardening, sewing, socializing at veterans clubs or eating out at casual restaurants.
- 58 **BACK COUNTRY FOLKS** – Strewn among remote farm communities across the nation, Back Country Folks are a long way away from economic paradise. The residents tend to be poor, over 55 years old and living in older, modest-sized homes and manufactured housing. Typically, life in this segment is a throwback to an earlier era when farming dominated the American landscape.
- 59 **URBAN ELDERS** – For Urban Elders—a segment located in the downtown neighborhoods of such metros as New York, Chicago, Las Vegas and Miami—life is often an economic struggle. These communities have high concentrations of Hispanics and African-Americans and tend to be downscale, with singles living in older apartment rentals.
- 60 **PARK BENCH SENIORS** – Park Bench Seniors are typically retired singles living in the racially mixed neighborhoods of the nation's satellite cities. With modest educations and incomes, these residents maintain low-key, sedentary lifestyles. Theirs is one of the top-ranked segments for TV viewing, especially daytime soaps and game shows.
- 61 **CITY ROOTS** – Found in urban neighborhoods, City Roots is a segment of lower-income retirees, typically living in older homes and duplexes they've owned for years. In these ethnically diverse neighborhoods—more than a third are African-American and Hispanic—residents are often widows and widowers living on fixed incomes and maintaining low-key lifestyles.

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## Brief Segment Descriptions

- 62 **HOMETOWN RETIRED** – With three-quarters of all residents over 65 years old, Hometown Retired is one of the oldest segments. These racially mixed seniors tend to live in aging homes—half were built before 1958—and typically get by on social security and modest pensions. Because most never made it beyond high school and spent their working lives at blue-collar jobs, their retirements are extremely modest.
- 63 **FAMILY THRIFTS** – The small-city cousins of inner-city districts, Family Thrifts contain young, ethnically diverse parents who have lots of children and work entry-level service jobs. In these apartment-filled neighborhoods, visitors find the streets jam-packed with babies and toddlers, tricycles and basketball hoops, Daewoos and Hyundais.
- 64 **BEDROCK AMERICA** – Bedrock America consists of young, economically challenged families in small, isolated towns located throughout the nation’s heartland. With modest educations, sprawling families and blue-collar jobs, many of these residents struggle to make ends meet. One quarter live in mobile homes. One in three has not finished high school. Rich in scenery, Bedrock America is a haven for fishing, hunting, hiking and camping.
- 65 **BIG CITY BLUES** – With a population that’s half Latino, Big City Blues has the highest concentration of Hispanic Americans in the nation, but it’s also the multi-ethnic address for downscale Asian and African-American households occupying older inner-city apartments. Concentrated in a handful of major metros, these young singles and single-parent families face enormous challenges: low incomes, uncertain jobs and modest educations. More than 40% haven’t finished high school.
- 66 **LOW-RISE LIVING** – The most economically challenged urban segment, Low-Rise Living is known as a transient world for young, ethnically diverse singles and single parents. Home values are low—about half the national average—and even then, less than a quarter of residents can afford to own real estate.

Buxton utilizes the Claritas® PRIZM®NE segmentation system in this analysis. PRIZM®NE and Claritas® are registered trademarks of Claritas Inc. The PRIZM segment nicknames (e.g., “Blue Blood Estates,” “Big Sky Families,” “Country Squires”) are trademarks of Claritas Inc.

The background features a large teal shape on the left and a large yellow shape on the right, both with curved edges. Overlapping these is a white, stylized graphic that resembles a house or a large letter 'A'.

# **Appendix A:**

# **Leakage Analysis**



# Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- Indicating how well the retail needs of local residents are being met
- Uncovering unmet demand and possible opportunities
- Understanding the strengths and weaknesses of the local retail sector
- Measuring the difference between actual and potential retail sales

## Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

## Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

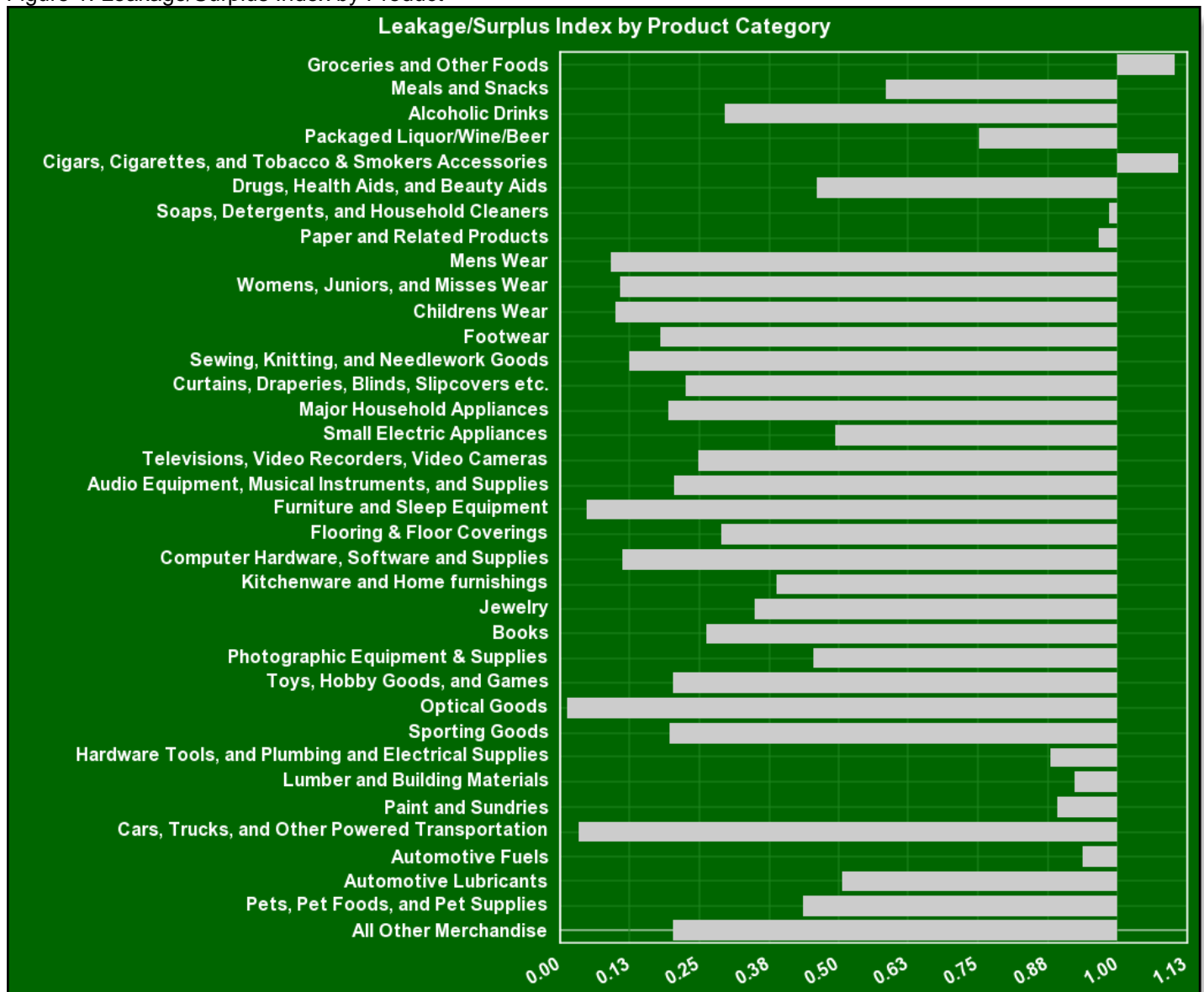
Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time

## Leakage/Surplus Index by Product

The Leakage/Surplus Index provides a relative comparison of the supply and demand across retail product categories. It is calculated by dividing actual sales by potential sales. An index greater than 1.0 means that the community is attracting retail sales (surplus) from outside the trade area. If the index is less than 1.0 it means that out-shopping is taking place and the community is not successfully drawing its own residents.

Leakage/Surplus Index (Figure 1) shows the strengths and weaknesses of a community's retail market by product.

Figure 1. Leakage/Surplus Index by Product





Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time

The sales potential and the actual sales potential by product category and the resulting index are shown in Figure 2.

Figure 2. Sales Potential and Actual Sales by Product

Product Type	Potential	Actual Sales	Leakage/Surplus Index
Groceries and Other Foods	20,161,232	22,220,422	1.1
Meals and Snacks	12,349,538	7,209,671	0.6
Alcoholic Drinks	1,132,025	333,991	0.3
Packaged Liquor/Wine/Beer	2,095,570	1,575,337	0.8
Cigars, Cigarettes, and Tobacco & Smokers Accessories	2,318,083	2,570,672	1.1
Drugs, Health Aids, and Beauty Aids	7,112,431	3,285,346	0.5
Soaps, Detergents, and Household Cleaners	851,203	839,155	1.0
Paper and Related Products	932,053	900,472	1.0
Mens Wear	2,371,700	219,211	0.1
Womens, Juniors, and Misses Wear	4,327,565	464,616	0.1
Childrens Wear	1,545,323	156,112	0.1
Footwear	2,043,217	367,493	0.2
Sewing, Knitting, and Needlework Goods	243,659	30,573	0.1
Curtains, Draperies, Blinds, Slipcovers etc.	701,594	157,216	0.2
Major Household Appliances	978,535	189,937	0.2
Small Electric Appliances	397,993	196,558	0.5
Televisions, Video Recorders, Video Cameras	964,072	237,476	0.2
Audio Equipment, Musical Instruments, and Supplies	1,478,334	301,584	0.2
Furniture and Sleep Equipment	2,032,165	93,405	0.0
Flooring & Floor Coverings	919,588	266,024	0.3
Computer Hardware, Software and Supplies	2,491,710	277,558	0.1
Kitchenware and Home furnishings	1,446,249	560,976	0.4
Jewelry	1,078,558	377,469	0.4
Books	604,486	159,561	0.3
Photographic Equipment & Supplies	261,710	119,219	0.5
Toys, Hobby Goods, and Games	1,057,299	213,942	0.2
Optical Goods	260,004	2,994	0.0
Sporting Goods	1,349,731	265,884	0.2
Hardware Tools, and Plumbing and Electrical Supplies	8,025,630	7,064,909	0.9
Lumber and Building Materials	6,160,105	5,691,075	0.9
Paint and Sundries	888,654	792,629	0.9
Cars, Trucks, and Other Powered Transportation	19,927,548	642,533	0.0
Automotive Fuels	11,636,121	10,906,244	0.9
Automotive Lubricants	4,256,465	2,157,571	0.5
Pets, Pet Foods, and Pet Supplies	820,730	357,622	0.4
All Other Merchandise	3,789,899	766,780	0.2

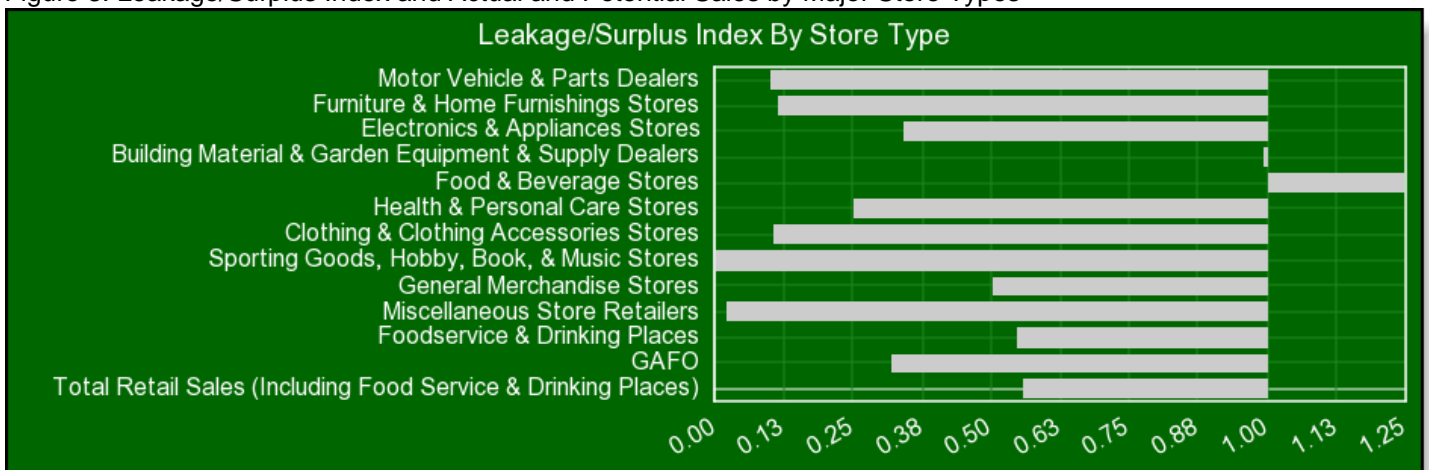
Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time

### Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 3 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 3. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



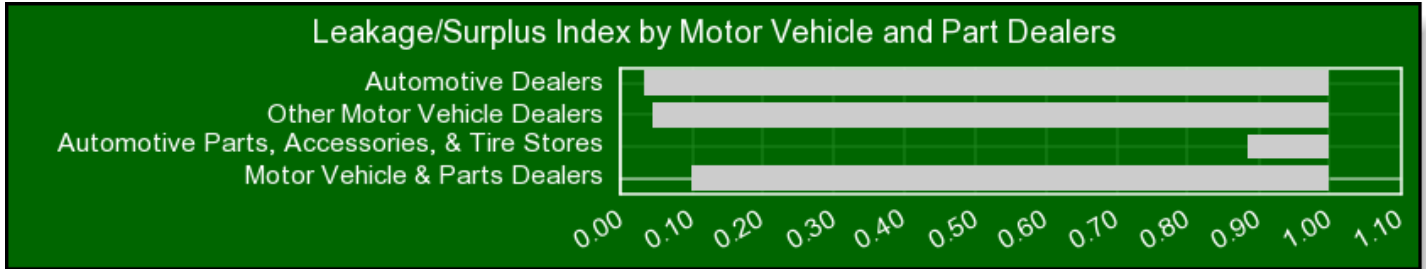
Store Type	Potential	Actual Sales	Leakage/Surplus Index
Motor Vehicle & Parts Dealers	24,731,263	2,453,366	0.10
Furniture & Home Furnishings Stores	3,074,801	346,618	0.11
Electronics & Appliances Stores	2,958,950	1,009,708	0.34
Building Material & Garden Equipment & Supply Dealers	14,124,524	14,037,701	0.99
Food & Beverage Stores	16,679,940	20,791,011	1.25
Health & Personal Care Stores	5,576,754	1,397,044	0.25
Clothing & Clothing Accessories Stores	5,758,706	600,638	0.10
Sporting Goods, Hobby, Book, & Music Stores	2,246,071	814	0.00
General Merchandise Stores	15,486,242	7,813,698	0.50
Miscellaneous Store Retailers	3,299,807	71,854	0.02
Foodservice & Drinking Places	12,509,464	6,835,186	0.55
GAFO	30,766,714	9,843,333	0.32
Total Retail Sales (Including Food Service & Drinking Places)	129,010,796	71,972,258	0.56

\* GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies.

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time

### Leakage/Surplus Analysis by Sub-Categories of Major Retail Types

Additional leakage/surplus details are provided on subcategories of stores in each of the twelve major store types. These details can help further identity possible business expansion opportunities.



Motor Vehicle and Parts Dealers	Potential	Actual Sales	Leakage/Surplus Index
Automotive Dealers	21,478,591	689,437	0.03
Other Motor Vehicle Dealers	1,323,525	59,796	0.05
Automotive Parts, Accessories, & Tire Stores	1,929,145	1,704,132	0.88
Motor Vehicle & Parts Dealers	24,731,263	2,453,366	0.10

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time



Electronics and Appliance Stores	Potential	Actual Sales	Leakage/Surplus Index
Household Appliances Stores	514,718	0	0.00
Radio Television and Other Electronics Stores	1,820,004	925,687	0.51
Appliance, Television, and Other Electronics Stores	2,334,722	925,687	0.40
Computer and Software Stores	518,936	84,020	0.16
Camera & Photographic Equipment Stores	105,291	0	0.00
Electronics & Appliances Stores	2,958,950	1,009,708	0.34

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time



Furniture and Home Furnishings Stores	Potential	Actual Sales	Leakage/Surplus Index
Furniture Stores	1,663,081	0	0.00
Home Furnishing Stores	1,411,719	346,618	0.25
Furniture & Home Furnishings Stores	3,074,801	346,618	0.11

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time



Building Material, Garden Equipment and Supply Dealers	Potential	Actual Sales	Leakage/Surplus Index
Home Centers	4,877,583	920,289	0.19
Paint and Wallpaper Stores	304,759	0	0.00
Hardware Stores	1,027,948	5,269,270	5.13
Building Materials, Lumberyards	2,232,953	2,676,303	1.20
Other Building Materials Dealers	6,688,663	7,848,142	1.17
Building Material & Supply Dealers	12,898,955	14,037,701	1.09
Outdoor Power Equipment Stores	195,979	0	0.00
Nursery and Garden Centers	1,029,588	0	0.00
Lawn and Garden Equipment and Supplies Stores	1,225,568	0	0.00
Building Material & Garden Equipment & Supply Dealers	14,124,524	14,037,701	0.99

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time



Food and Beverage Stores	Potential	Actual Sales	Leakage/Surplus Index
Supermarkets and Other Grocery (except Convenience) Stores	14,454,615	20,403,017	1.41
Convenience Stores	737,659	247,229	0.34
Grocery Stores	15,192,274	20,650,246	1.36
Specialty Food Stores	534,061	140,764	0.26
Beer, Wine, & Liquor Stores	953,604	0	0.00
Food & Beverage Stores	16,679,940	20,791,011	1.25

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time



Health and Personal Care Stores	Potential	Actual Sales	Leakage/Surplus Index
Pharmacies and Drug Stores	4,800,756	1,397,044	0.29
Cosmetics, Beauty Supplies and Perfume Stores	193,454	0	0.00
Optical Goods Stores	220,205	0	0.00
Other Health and Personal Care Stores	362,337	0	0.00
Health & Personal Care Stores	5,576,754	1,397,044	0.25



Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time



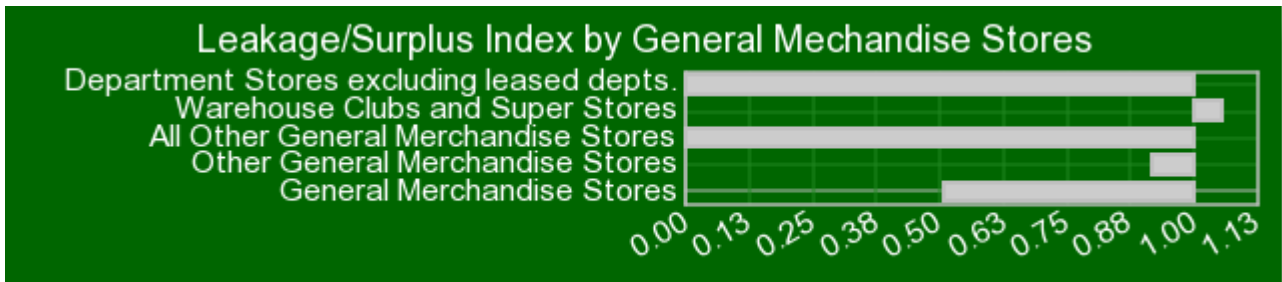
Clothing and Clothing Accessories Stores	Potential	Actual Sales	Leakage/Surplus Index
Mens Clothing Stores	259,484	0	0.00
Womens Clothing Stores	1,038,704	217,256	0.21
Childrens and Infants Clothing Stores	301,228	10,636	0.04
Family Clothing Stores	2,226,338	0	0.00
Clothing Accessories Stores	86,523	148,508	1.72
Other Clothing Stores	274,896	0	0.00
Clothing Stores	4,187,175	376,402	0.09
Shoe Stores	909,785	0	0.00
Jewelry Stores	606,403	224,236	0.37
Luggage, & Leather Goods Stores	55,340	0	0.00
Jewelry, Luggage, & Leather Goods Stores	661,744	224,236	0.34
Clothing & Clothing Accessories Stores	5,758,706	600,638	0.10

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time



Sporting Goods, Hobby, Book and Music Stores	Potential	Actual Sales	Leakage/Surplus Index
Sporting Goods Stores	736,727	0	0.00
Hobby, Toys and Games Stores	517,360	0	0.00
Sew/Needlework/Piece Goods Stores	144,980	814	0.01
Musical Instrument and Supplies Stores	169,200	0	0.00
Sporting Goods, Hobby, & Musical Instrument Stores	1,568,267	814	0.00
Book Stores	378,120	0	0.00
News Dealers and Newsstands	24,228	0	0.00
Book Stores and News Dealers	402,349	0	0.00
Prerecorded Tape, Compact Disc, and Record Stores	275,454	0	0.00
Book, Periodical, & Music Stores	677,803	0	0.00
Sporting Goods, Hobby, Book, & Music Stores	2,246,071	814	0.00

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time



General Merchandise Stores	Potential	Actual Sales	Leakage/Surplus Index
Department Stores excluding leased depts.	6,972,958	0	0.00
Warehouse Clubs and Super Stores	7,399,903	7,813,698	1.06
All Other General Merchandise Stores	1,113,381	0	0.00
Other General Merchandise Stores	8,513,284	7,813,698	0.92
General Merchandise Stores	15,486,242	7,813,698	0.50

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time



Miscellaneous Store Retailers	Potential	Actual Sales	Leakage/Surplus Index
Florists	226,658	0	0.00
Office Supplies and Stationery Stores	697,461	0	0.00
Gift, Novelty, and Souvenir Stores	544,481	71,854	0.13
Office Supplies, Stationery, & Gift Stores	1,241,942	71,854	0.06
Used Merchandise Stores	271,023	0	0.00
Other Miscellaneous Store Retailers	1,560,182	0	0.00
Miscellaneous Store Retailers	3,299,807	71,854	0.02

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time



Foodservice and Drinking Places	Potential	Actual Sales	Leakage/Surplus Index
Full-service Restaurants	5,639,813	66,311	0.01
Limited-service Eating Places	5,374,760	6,426,731	1.20
Special Foodservices	1,026,583	0	0.00
Drinking Places -Alcoholic Beverages	468,307	342,143	0.73
Foodservice & Drinking Places	12,509,464	6,835,186	0.55

Site	Address	Analysis Geography
1	Porter Rd & Maricopa Casa Grande Hwy Maricopa, AZ 85239	15 Minute Drive Time

## Sources and Methodology

Household demand estimates are derived by combining data from the Consumer Expenditures Survey by the Bureau of Labor Statistics with current household demographic estimates from Claritas. The demand estimates only account for household expenditures. Demand is defined as the estimated dollar amount spent by a household that resides in the area of analysis for a specified retail store type or merchandise line item.

Supply estimates are generated from the Census of Retail Trade, a component of the Economic Census. County-level sales tax data is allocated to low levels of geography using business sales estimates, business locations, and employee counts provided by Claritas' Business Facts® database. Supply includes all products sold at retail outlets in a specified area for a one-year period. Supply is defined as the estimated total retail sales for a retail store type or merchandise line item.

Source: Retail Market Power™ (Claritas).

# Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- Indicating how well the retail needs of local residents are being met
- Uncovering unmet demand and possible opportunities
- Understanding the strengths and weaknesses of the local retail sector
- Measuring the difference between actual and potential retail sales

## Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

## Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

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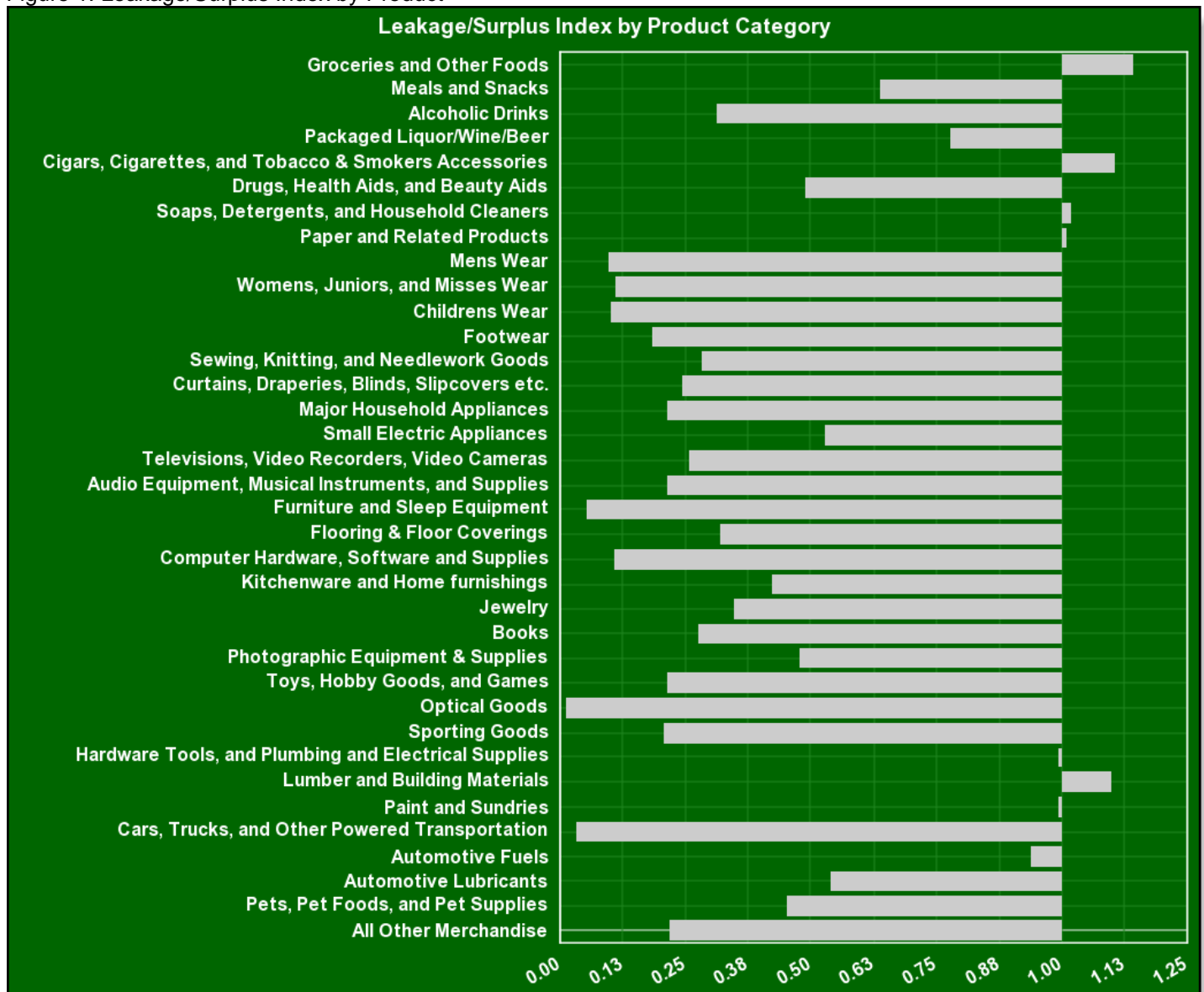
Site	Address	Analysis Geography
2	Edison Rd & State Route 347 Maricopa, AZ 85239	15 Minute Drive Time

## Leakage/Surplus Index by Product

The Leakage/Surplus Index provides a relative comparison of the supply and demand across retail product categories. It is calculated by dividing actual sales by potential sales. An index greater than 1.0 means that the community is attracting retail sales (surplus) from outside the trade area. If the index is less than 1.0 it means that out-shopping is taking place and the community is not successfully drawing its own residents.

Leakage/Surplus Index (Figure 1) shows the strengths and weaknesses of a community's retail market by product.

Figure 1. Leakage/Surplus Index by Product





Site	Address	Analysis Geography
2	Edison Rd & State Route 347 Maricopa, AZ 85239	15 Minute Drive Time

The sales potential and the actual sales potential by product category and the resulting index are shown in Figure 2.

Figure 2. Sales Potential and Actual Sales by Product

Product Type	Potential	Actual Sales	Leakage/Surplus Index
Groceries and Other Foods	20,625,524	23,565,555	1.1
Meals and Snacks	12,513,227	7,974,850	0.6
Alcoholic Drinks	1,125,763	352,576	0.3
Packaged Liquor/Wine/Beer	2,110,103	1,643,580	0.8
Cigars, Cigarettes, and Tobacco & Smokers Accessories	2,397,967	2,653,735	1.1
Drugs, Health Aids, and Beauty Aids	7,144,066	3,508,637	0.5
Soaps, Detergents, and Household Cleaners	876,678	893,728	1.0
Paper and Related Products	948,916	958,963	1.0
Mens Wear	2,412,111	233,321	0.1
Womens, Juniors, and Misses Wear	4,436,360	497,991	0.1
Childrens Wear	1,617,790	166,356	0.1
Footwear	2,107,862	385,353	0.2
Sewing, Knitting, and Needlework Goods	244,541	68,979	0.3
Curtains, Draperies, Blinds, Slipcovers etc.	703,597	171,088	0.2
Major Household Appliances	982,169	208,497	0.2
Small Electric Appliances	400,996	211,712	0.5
Televisions, Video Recorders, Video Cameras	980,036	251,620	0.3
Audio Equipment, Musical Instruments, and Supplies	1,495,828	319,915	0.2
Furniture and Sleep Equipment	2,046,337	105,480	0.1
Flooring & Floor Coverings	918,763	294,086	0.3
Computer Hardware, Software and Supplies	2,509,636	275,664	0.1
Kitchenware and Home furnishings	1,445,301	609,335	0.4
Jewelry	1,081,516	375,908	0.3
Books	610,482	167,646	0.3
Photographic Equipment & Supplies	264,602	125,992	0.5
Toys, Hobby Goods, and Games	1,080,707	229,418	0.2
Optical Goods	262,324	3,257	0.0
Sporting Goods	1,371,720	282,748	0.2
Hardware Tools, and Plumbing and Electrical Supplies	8,069,560	8,024,334	1.0
Lumber and Building Materials	6,148,097	6,768,181	1.1
Paint and Sundries	885,018	878,827	1.0
Cars, Trucks, and Other Powered Transportation	20,104,017	615,822	0.0
Automotive Fuels	11,780,319	11,066,305	0.9
Automotive Lubricants	4,261,384	2,304,261	0.5
Pets, Pet Foods, and Pet Supplies	840,684	379,387	0.5
All Other Merchandise	3,817,357	827,811	0.2

Site	Address	Analysis Geography
2	Edison Rd & State Route 347 Maricopa, AZ 85239	15 Minute Drive Time

### Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 3 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 3. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



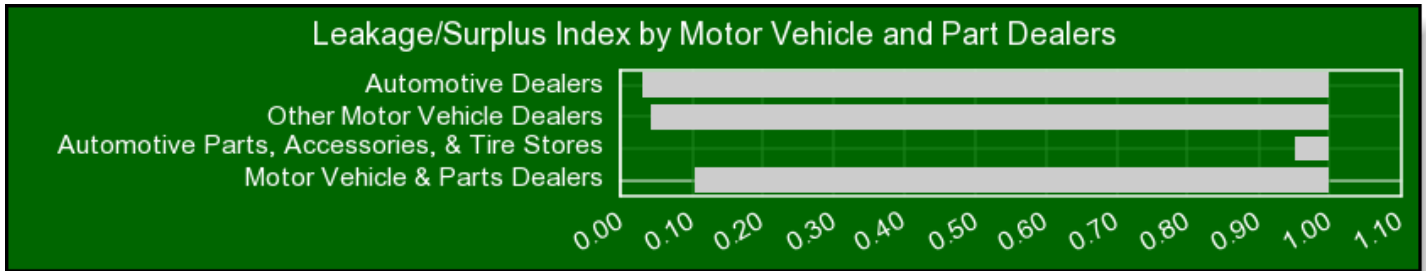
Store Type	Potential	Actual Sales	Leakage/Surplus Index
Motor Vehicle & Parts Dealers	24,944,581	2,550,550	0.10
Furniture & Home Furnishings Stores	3,086,888	370,938	0.12
Electronics & Appliances Stores	2,988,565	1,039,945	0.35
Building Material & Garden Equipment & Supply Dealers	14,160,063	16,240,750	1.15
Food & Beverage Stores	17,022,496	22,279,511	1.31
Health & Personal Care Stores	5,617,585	1,499,142	0.27
Clothing & Clothing Accessories Stores	5,891,022	607,466	0.10
Sporting Goods, Hobby, Book, & Music Stores	2,279,671	45,739	0.02
General Merchandise Stores	15,764,668	8,219,047	0.52
Miscellaneous Store Retailers	3,340,387	91,739	0.03
Foodservice & Drinking Places	12,655,193	7,592,156	0.60
GAFO	31,263,743	10,362,083	0.33
Total Retail Sales (Including Food Service & Drinking Places)	130,621,374	77,400,939	0.59

\* GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies.

Site	Address	Analysis Geography
2	Edison Rd & State Route 347 Maricopa, AZ 85239	15 Minute Drive Time

### Leakage/Surplus Analysis by Sub-Categories of Major Retail Types

Additional leakage/surplus details are provided on subcategories of stores in each of the twelve major store types. These details can help further identity possible business expansion opportunities.



Motor Vehicle and Parts Dealers	Potential	Actual Sales	Leakage/Surplus Index
Automotive Dealers	21,671,107	660,469	0.03
Other Motor Vehicle Dealers	1,340,604	56,172	0.04
Automotive Parts, Accessories, & Tire Stores	1,932,870	1,833,908	0.95
Motor Vehicle & Parts Dealers	24,944,581	2,550,550	0.10

Site	Address	Analysis Geography
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Electronics and Appliance Stores	Potential	Actual Sales	Leakage/Surplus Index
Household Appliances Stores	518,376	0	0.00
Radio Television and Other Electronics Stores	1,840,545	968,451	0.53
Appliance, Television, and Other Electronics Stores	2,358,921	968,451	0.41
Computer and Software Stores	523,098	71,493	0.14
Camera & Photographic Equipment Stores	106,544	0	0.00
Electronics & Appliances Stores	2,988,565	1,039,945	0.35

Site	Address	Analysis Geography
2	Edison Rd & State Route 347 Maricopa, AZ 85239	15 Minute Drive Time



Furniture and Home Furnishings Stores	Potential	Actual Sales	Leakage/Surplus Index
Furniture Stores	1,674,000	0	0.00
Home Furnishing Stores	1,412,887	370,938	0.26
Furniture & Home Furnishings Stores	3,086,888	370,938	0.12

Site	Address	Analysis Geography
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Building Material, Garden Equipment and Supply Dealers	Potential	Actual Sales	Leakage/Surplus Index
Home Centers	4,881,152	1,011,107	0.21
Paint and Wallpaper Stores	304,173	0	0.00
Hardware Stores	1,032,440	5,789,263	5.61
Building Materials, Lumberyards	2,231,379	3,219,273	1.44
Other Building Materials Dealers	6,713,221	9,440,378	1.41
Building Material & Supply Dealers	12,930,988	16,240,750	1.26
Outdoor Power Equipment Stores	196,082	0	0.00
Nursery and Garden Centers	1,032,992	0	0.00
Lawn and Garden Equipment and Supplies Stores	1,229,075	0	0.00
Building Material & Garden Equipment & Supply Dealers	14,160,063	16,240,750	1.15

Site	Address	Analysis Geography
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Food and Beverage Stores	Potential	Actual Sales	Leakage/Surplus Index
Supermarkets and Other Grocery (except Convenience) Stores	14,759,911	21,863,261	1.48
Convenience Stores	753,404	271,626	0.36
Grocery Stores	15,513,316	22,134,888	1.43
Specialty Food Stores	546,645	144,622	0.26
Beer, Wine, & Liquor Stores	962,534	0	0.00
Food & Beverage Stores	17,022,496	22,279,511	1.31

Site	Address	Analysis Geography
2	Edison Rd & State Route 347 Maricopa, AZ 85239	15 Minute Drive Time



Health and Personal Care Stores	Potential	Actual Sales	Leakage/Surplus Index
Pharmacies and Drug Stores	4,836,143	1,499,142	0.31
Cosmetics, Beauty Supplies and Perfume Stores	194,348	0	0.00
Optical Goods Stores	222,127	0	0.00
Other Health and Personal Care Stores	364,965	0	0.00
Health & Personal Care Stores	5,617,585	1,499,142	0.27



Site	Address	Analysis Geography
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Clothing and Clothing Accessories Stores	Potential	Actual Sales	Leakage/Surplus Index
Mens Clothing Stores	264,164	0	0.00
Womens Clothing Stores	1,064,382	238,696	0.22
Childrens and Infants Clothing Stores	314,080	11,686	0.04
Family Clothing Stores	2,277,510	0	0.00
Clothing Accessories Stores	87,869	142,268	1.62
Other Clothing Stores	281,394	0	0.00
Clothing Stores	4,289,403	392,651	0.09
Shoe Stores	937,562	0	0.00
Jewelry Stores	608,433	214,815	0.35
Luggage, & Leather Goods Stores	55,622	0	0.00
Jewelry, Luggage, & Leather Goods Stores	664,056	214,815	0.32
Clothing & Clothing Accessories Stores	5,891,022	607,466	0.10

Site	Address	Analysis Geography
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Sporting Goods, Hobby, Book and Music Stores	Potential	Actual Sales	Leakage/Surplus Index
Sporting Goods Stores	750,655	0	0.00
Hobby, Toys and Games Stores	526,626	0	0.00
Sew/Needlework/Piece Goods Stores	145,578	45,739	0.31
Musical Instrument and Supplies Stores	171,219	0	0.00
Sporting Goods, Hobby, & Musical Instrument Stores	1,594,079	45,739	0.03
Book Stores	381,781	0	0.00
News Dealers and Newsstands	24,377	0	0.00
Book Stores and News Dealers	406,159	0	0.00
Prerecorded Tape, Compact Disc, and Record Stores	279,432	0	0.00
Book, Periodical, & Music Stores	685,591	0	0.00
Sporting Goods, Hobby, Book, & Music Stores	2,279,671	45,739	0.02

Site	Address	Analysis Geography
2	Edison Rd & State Route 347 Maricopa, AZ 85239	15 Minute Drive Time



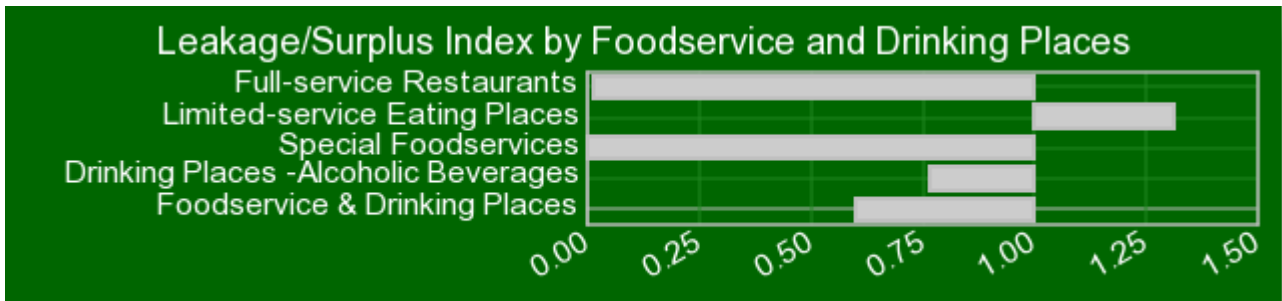
General Merchandise Stores	Potential	Actual Sales	Leakage/Surplus Index
Department Stores excluding leased depts.	7,095,817	0	0.00
Warehouse Clubs and Super Stores	7,541,394	8,119,053	1.08
All Other General Merchandise Stores	1,127,456	99,993	0.09
Other General Merchandise Stores	8,668,851	8,219,047	0.95
General Merchandise Stores	15,764,668	8,219,047	0.52

Site	Address	Analysis Geography
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Miscellaneous Store Retailers	Potential	Actual Sales	Leakage/Surplus Index
Florists	227,774	0	0.00
Office Supplies and Stationery Stores	703,179	0	0.00
Gift, Novelty, and Souvenir Stores	549,748	78,945	0.14
Office Supplies, Stationery, & Gift Stores	1,252,927	78,945	0.06
Used Merchandise Stores	274,947	12,793	0.05
Other Miscellaneous Store Retailers	1,584,737	0	0.00
Miscellaneous Store Retailers	3,340,387	91,739	0.03

Site	Address	Analysis Geography
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Foodservice and Drinking Places	Potential	Actual Sales	Leakage/Surplus Index
Full-service Restaurants	5,701,895	72,855	0.01
Limited-service Eating Places	5,445,686	7,161,317	1.32
Special Foodservices	1,039,776	0	0.00
Drinking Places -Alcoholic Beverages	467,834	357,983	0.77
Foodservice & Drinking Places	12,655,193	7,592,156	0.60

Site	Address	Analysis Geography
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### **Sources and Methodology**

Household demand estimates are derived by combining data from the Consumer Expenditures Survey by the Bureau of Labor Statistics with current household demographic estimates from Claritas. The demand estimates only account for household expenditures. Demand is defined as the estimated dollar amount spent by a household that resides in the area of analysis for a specified retail store type or merchandise line item.

Supply estimates are generated from the Census of Retail Trade, a component of the Economic Census. County-level sales tax data is allocated to low levels of geography using business sales estimates, business locations, and employee counts provided by Claritas' Business Facts® database. Supply includes all products sold at retail outlets in a specified area for a one-year period. Supply is defined as the estimated total retail sales for a retail store type or merchandise line item.

Source: Retail Market Power™ (Claritas).

# Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- Indicating how well the retail needs of local residents are being met
- Uncovering unmet demand and possible opportunities
- Understanding the strengths and weaknesses of the local retail sector
- Measuring the difference between actual and potential retail sales

## Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

## Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

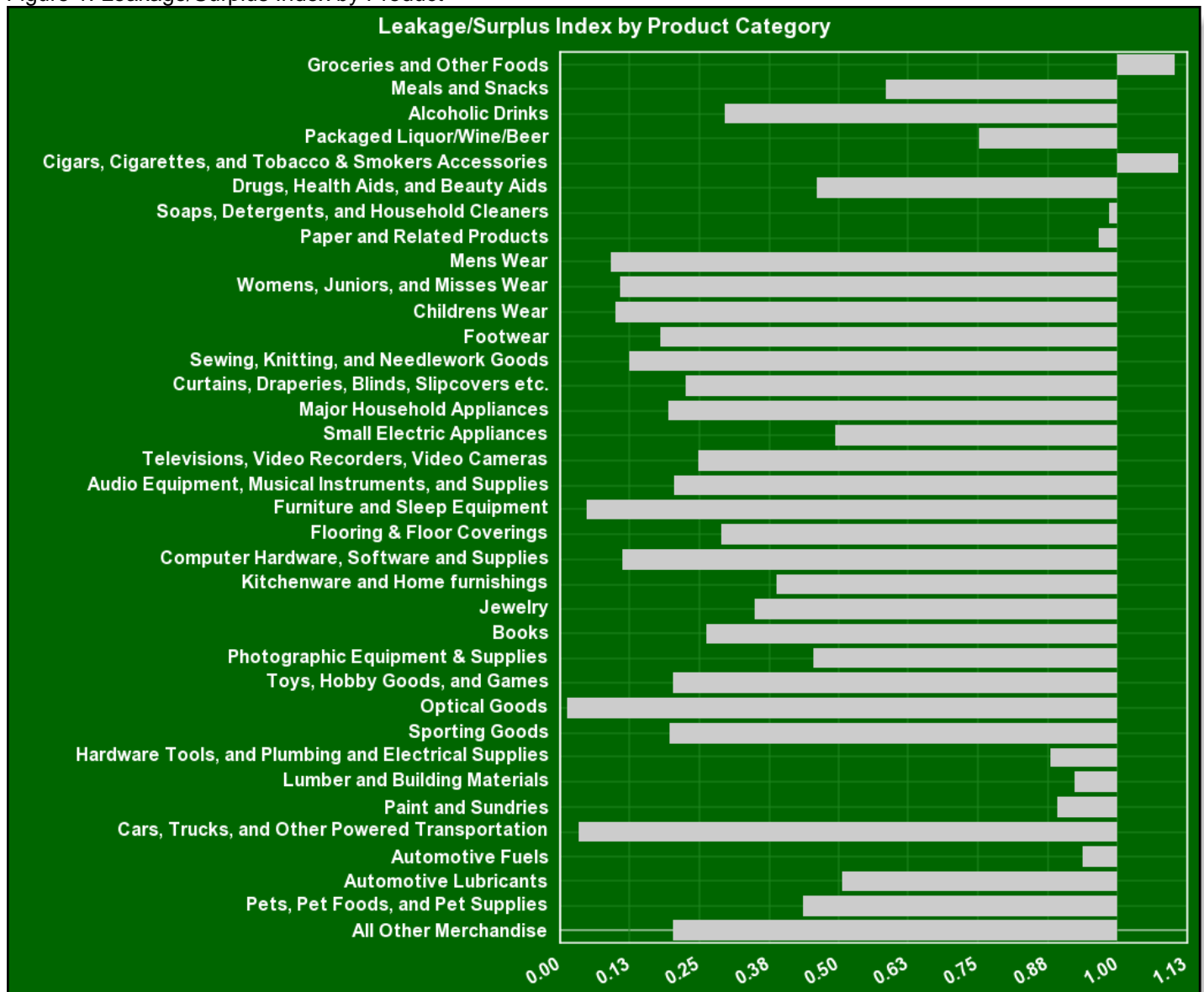
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## Leakage/Surplus Index by Product

The Leakage/Surplus Index provides a relative comparison of the supply and demand across retail product categories. It is calculated by dividing actual sales by potential sales. An index greater than 1.0 means that the community is attracting retail sales (surplus) from outside the trade area. If the index is less than 1.0 it means that out-shopping is taking place and the community is not successfully drawing its own residents.

Leakage/Surplus Index (Figure 1) shows the strengths and weaknesses of a community's retail market by product.

Figure 1. Leakage/Surplus Index by Product





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The sales potential and the actual sales potential by product category and the resulting index are shown in Figure 2.

Figure 2. Sales Potential and Actual Sales by Product

Product Type	Potential	Actual Sales	Leakage/Surplus Index
Groceries and Other Foods	20,161,232	22,220,422	1.1
Meals and Snacks	12,349,538	7,209,671	0.6
Alcoholic Drinks	1,132,025	333,991	0.3
Packaged Liquor/Wine/Beer	2,095,570	1,575,337	0.8
Cigars, Cigarettes, and Tobacco & Smokers Accessories	2,318,083	2,570,672	1.1
Drugs, Health Aids, and Beauty Aids	7,112,431	3,285,346	0.5
Soaps, Detergents, and Household Cleaners	851,203	839,155	1.0
Paper and Related Products	932,053	900,472	1.0
Mens Wear	2,371,700	219,211	0.1
Womens, Juniors, and Misses Wear	4,327,565	464,616	0.1
Childrens Wear	1,545,323	156,112	0.1
Footwear	2,043,217	367,493	0.2
Sewing, Knitting, and Needlework Goods	243,659	30,573	0.1
Curtains, Draperies, Blinds, Slipcovers etc.	701,594	157,216	0.2
Major Household Appliances	978,535	189,937	0.2
Small Electric Appliances	397,993	196,558	0.5
Televisions, Video Recorders, Video Cameras	964,072	237,476	0.2
Audio Equipment, Musical Instruments, and Supplies	1,478,334	301,584	0.2
Furniture and Sleep Equipment	2,032,165	93,405	0.0
Flooring & Floor Coverings	919,588	266,024	0.3
Computer Hardware, Software and Supplies	2,491,710	277,558	0.1
Kitchenware and Home furnishings	1,446,249	560,976	0.4
Jewelry	1,078,558	377,469	0.4
Books	604,486	159,561	0.3
Photographic Equipment & Supplies	261,710	119,219	0.5
Toys, Hobby Goods, and Games	1,057,299	213,942	0.2
Optical Goods	260,004	2,994	0.0
Sporting Goods	1,349,731	265,884	0.2
Hardware Tools, and Plumbing and Electrical Supplies	8,025,630	7,064,909	0.9
Lumber and Building Materials	6,160,105	5,691,075	0.9
Paint and Sundries	888,654	792,629	0.9
Cars, Trucks, and Other Powered Transportation	19,927,548	642,533	0.0
Automotive Fuels	11,636,121	10,906,244	0.9
Automotive Lubricants	4,256,465	2,157,571	0.5
Pets, Pet Foods, and Pet Supplies	820,730	357,622	0.4
All Other Merchandise	3,789,899	766,780	0.2

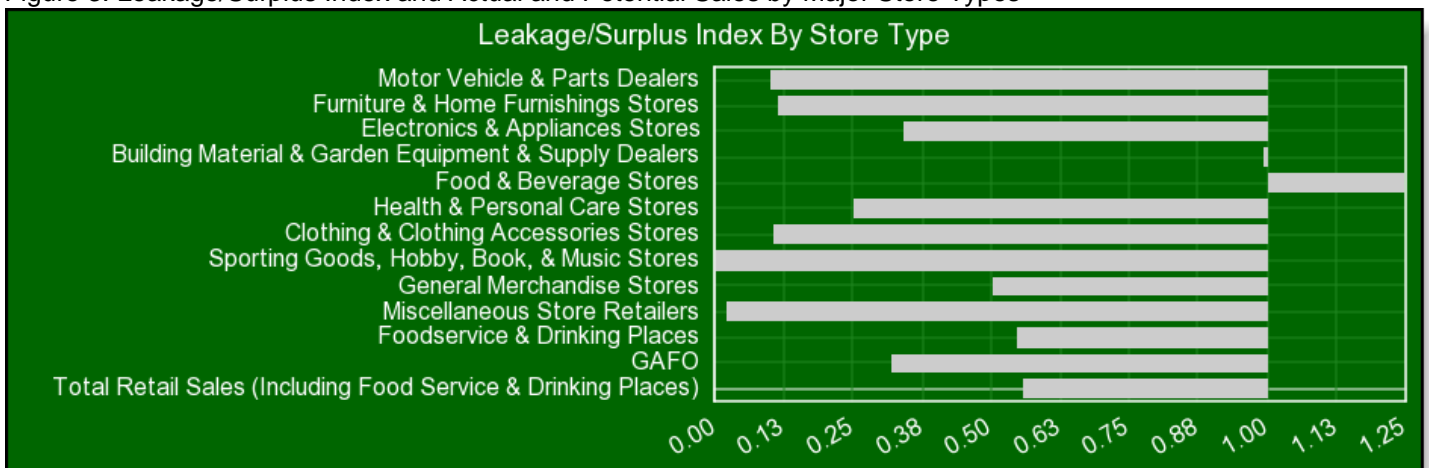
Site	Address	Analysis Geography
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### Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 3 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 3. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



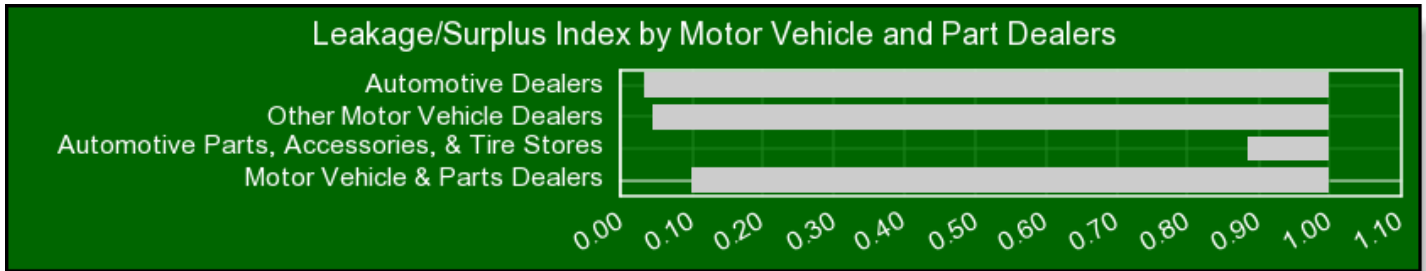
Store Type	Potential	Actual Sales	Leakage/Surplus Index
Motor Vehicle & Parts Dealers	24,731,263	2,453,366	0.10
Furniture & Home Furnishings Stores	3,074,801	346,618	0.11
Electronics & Appliances Stores	2,958,950	1,009,708	0.34
Building Material & Garden Equipment & Supply Dealers	14,124,524	14,037,701	0.99
Food & Beverage Stores	16,679,940	20,791,011	1.25
Health & Personal Care Stores	5,576,754	1,397,044	0.25
Clothing & Clothing Accessories Stores	5,758,706	600,638	0.10
Sporting Goods, Hobby, Book, & Music Stores	2,246,071	814	0.00
General Merchandise Stores	15,486,242	7,813,698	0.50
Miscellaneous Store Retailers	3,299,807	71,854	0.02
Foodservice & Drinking Places	12,509,464	6,835,186	0.55
GAFO	30,766,714	9,843,333	0.32
Total Retail Sales (Including Food Service & Drinking Places)	129,010,796	71,972,258	0.56

\* GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies.

Site	Address	Analysis Geography
3	15406 Maricopa Rd Maricopa, AZ 85239	15 Minute Drive Time

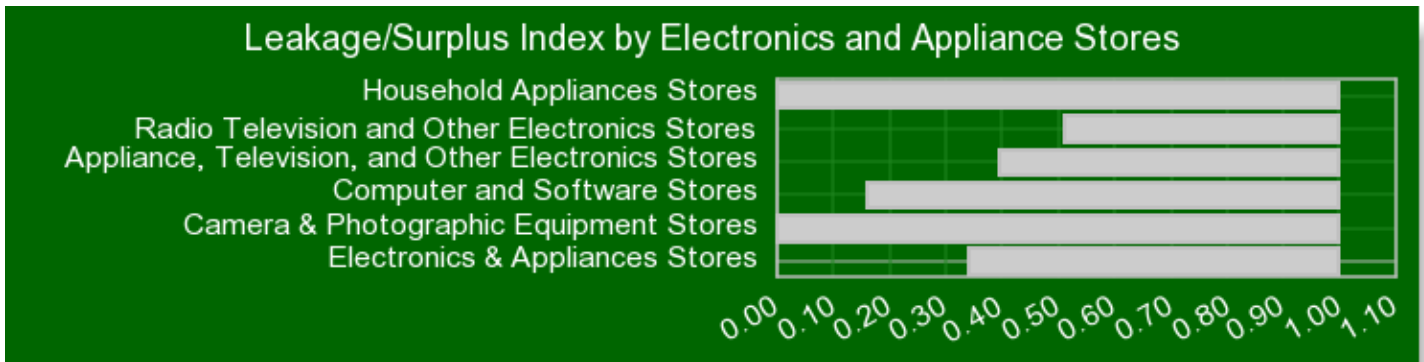
### Leakage/Surplus Analysis by Sub-Categories of Major Retail Types

Additional leakage/surplus details are provided on subcategories of stores in each of the twelve major store types. These details can help further identity possible business expansion opportunities.



Motor Vehicle and Parts Dealers	Potential	Actual Sales	Leakage/Surplus Index
Automotive Dealers	21,478,591	689,437	0.03
Other Motor Vehicle Dealers	1,323,525	59,796	0.05
Automotive Parts, Accessories, & Tire Stores	1,929,145	1,704,132	0.88
Motor Vehicle & Parts Dealers	24,731,263	2,453,366	0.10

Site	Address	Analysis Geography
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Electronics and Appliance Stores	Potential	Actual Sales	Leakage/Surplus Index
Household Appliances Stores	514,718	0	0.00
Radio Television and Other Electronics Stores	1,820,004	925,687	0.51
Appliance, Television, and Other Electronics Stores	2,334,722	925,687	0.40
Computer and Software Stores	518,936	84,020	0.16
Camera & Photographic Equipment Stores	105,291	0	0.00
Electronics & Appliances Stores	2,958,950	1,009,708	0.34

Site	Address	Analysis Geography
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Furniture and Home Furnishings Stores	Potential	Actual Sales	Leakage/Surplus Index
Furniture Stores	1,663,081	0	0.00
Home Furnishing Stores	1,411,719	346,618	0.25
Furniture & Home Furnishings Stores	3,074,801	346,618	0.11

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Building Material, Garden Equipment and Supply Dealers	Potential	Actual Sales	Leakage/Surplus Index
Home Centers	4,877,583	920,289	0.19
Paint and Wallpaper Stores	304,759	0	0.00
Hardware Stores	1,027,948	5,269,270	5.13
Building Materials, Lumberyards	2,232,953	2,676,303	1.20
Other Building Materials Dealers	6,688,663	7,848,142	1.17
Building Material & Supply Dealers	12,898,955	14,037,701	1.09
Outdoor Power Equipment Stores	195,979	0	0.00
Nursery and Garden Centers	1,029,588	0	0.00
Lawn and Garden Equipment and Supplies Stores	1,225,568	0	0.00
Building Material & Garden Equipment & Supply Dealers	14,124,524	14,037,701	0.99

Site	Address	Analysis Geography
3	15406 Maricopa Rd Maricopa, AZ 85239	15 Minute Drive Time



Food and Beverage Stores	Potential	Actual Sales	Leakage/Surplus Index
Supermarkets and Other Grocery (except Convenience) Stores	14,454,615	20,403,017	1.41
Convenience Stores	737,659	247,229	0.34
Grocery Stores	15,192,274	20,650,246	1.36
Specialty Food Stores	534,061	140,764	0.26
Beer, Wine, & Liquor Stores	953,604	0	0.00
Food & Beverage Stores	16,679,940	20,791,011	1.25

Site	Address	Analysis Geography
3	15406 Maricopa Rd Maricopa, AZ 85239	15 Minute Drive Time



Health and Personal Care Stores	Potential	Actual Sales	Leakage/Surplus Index
Pharmacies and Drug Stores	4,800,756	1,397,044	0.29
Cosmetics, Beauty Supplies and Perfume Stores	193,454	0	0.00
Optical Goods Stores	220,205	0	0.00
Other Health and Personal Care Stores	362,337	0	0.00
Health & Personal Care Stores	5,576,754	1,397,044	0.25



Site	Address	Analysis Geography
3	15406 Maricopa Rd Maricopa, AZ 85239	15 Minute Drive Time



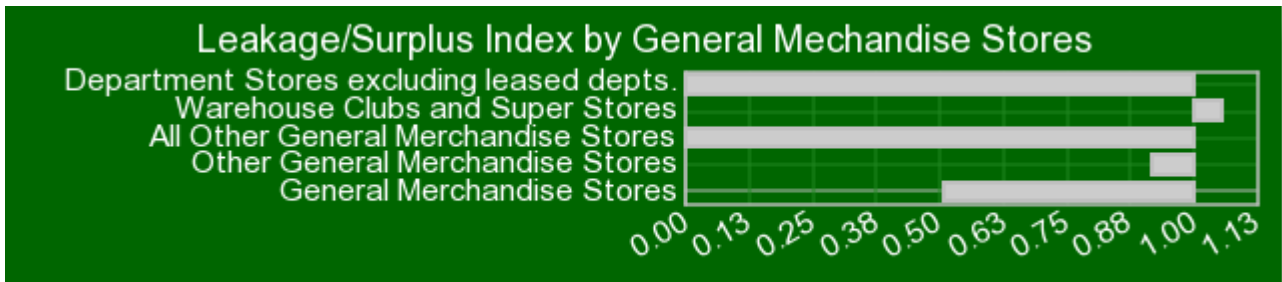
Clothing and Clothing Accessories Stores	Potential	Actual Sales	Leakage/Surplus Index
Mens Clothing Stores	259,484	0	0.00
Womens Clothing Stores	1,038,704	217,256	0.21
Childrens and Infants Clothing Stores	301,228	10,636	0.04
Family Clothing Stores	2,226,338	0	0.00
Clothing Accessories Stores	86,523	148,508	1.72
Other Clothing Stores	274,896	0	0.00
Clothing Stores	4,187,175	376,402	0.09
Shoe Stores	909,785	0	0.00
Jewelry Stores	606,403	224,236	0.37
Luggage, & Leather Goods Stores	55,340	0	0.00
Jewelry, Luggage, & Leather Goods Stores	661,744	224,236	0.34
Clothing & Clothing Accessories Stores	5,758,706	600,638	0.10

Site	Address	Analysis Geography
3	15406 Maricopa Rd Maricopa, AZ 85239	15 Minute Drive Time



Sporting Goods, Hobby, Book and Music Stores	Potential	Actual Sales	Leakage/Surplus Index
Sporting Goods Stores	736,727	0	0.00
Hobby, Toys and Games Stores	517,360	0	0.00
Sew/Needlework/Piece Goods Stores	144,980	814	0.01
Musical Instrument and Supplies Stores	169,200	0	0.00
Sporting Goods, Hobby, & Musical Instrument Stores	1,568,267	814	0.00
Book Stores	378,120	0	0.00
News Dealers and Newsstands	24,228	0	0.00
Book Stores and News Dealers	402,349	0	0.00
Prerecorded Tape, Compact Disc, and Record Stores	275,454	0	0.00
Book, Periodical, & Music Stores	677,803	0	0.00
Sporting Goods, Hobby, Book, & Music Stores	2,246,071	814	0.00

Site	Address	Analysis Geography
3	15406 Maricopa Rd Maricopa, AZ 85239	15 Minute Drive Time



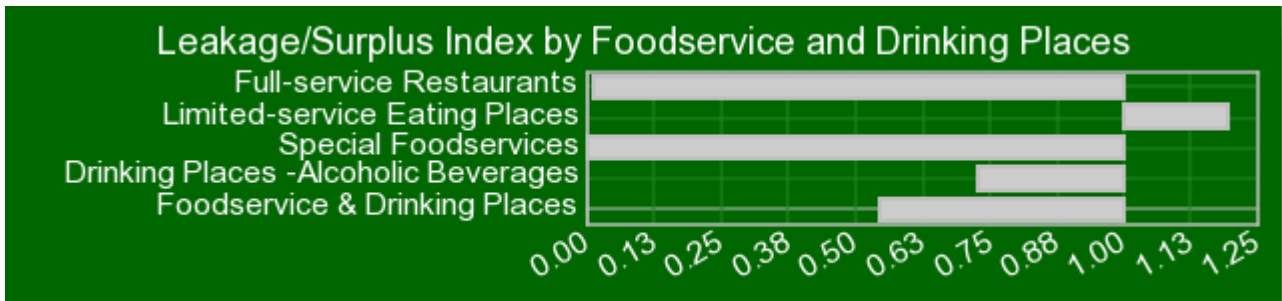
General Merchandise Stores	Potential	Actual Sales	Leakage/Surplus Index
Department Stores excluding leased depts.	6,972,958	0	0.00
Warehouse Clubs and Super Stores	7,399,903	7,813,698	1.06
All Other General Merchandise Stores	1,113,381	0	0.00
Other General Merchandise Stores	8,513,284	7,813,698	0.92
General Merchandise Stores	15,486,242	7,813,698	0.50

Site	Address	Analysis Geography
3	15406 Maricopa Rd Maricopa, AZ 85239	15 Minute Drive Time



Miscellaneous Store Retailers	Potential	Actual Sales	Leakage/Surplus Index
Florists	226,658	0	0.00
Office Supplies and Stationery Stores	697,461	0	0.00
Gift, Novelty, and Souvenir Stores	544,481	71,854	0.13
Office Supplies, Stationery, & Gift Stores	1,241,942	71,854	0.06
Used Merchandise Stores	271,023	0	0.00
Other Miscellaneous Store Retailers	1,560,182	0	0.00
Miscellaneous Store Retailers	3,299,807	71,854	0.02

Site	Address	Analysis Geography
3	15406 Maricopa Rd Maricopa, AZ 85239	15 Minute Drive Time



Foodservice and Drinking Places	Potential	Actual Sales	Leakage/Surplus Index
Full-service Restaurants	5,639,813	66,311	0.01
Limited-service Eating Places	5,374,760	6,426,731	1.20
Special Foodservices	1,026,583	0	0.00
Drinking Places -Alcoholic Beverages	468,307	342,143	0.73
Foodservice & Drinking Places	12,509,464	6,835,186	0.55

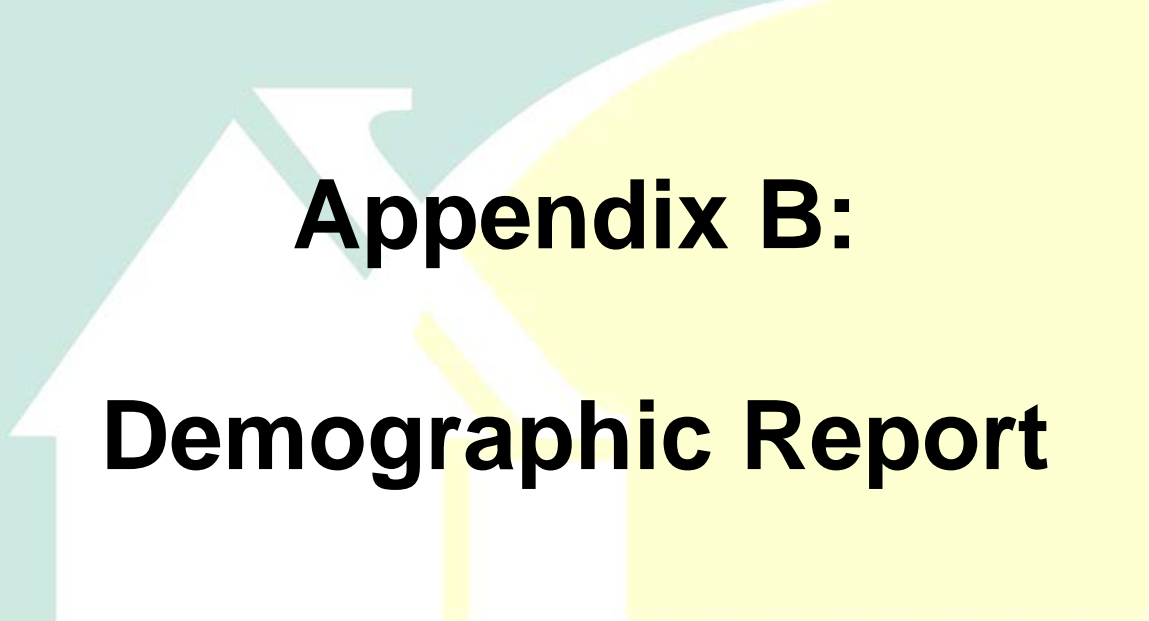
Site	Address	Analysis Geography
3	15406 Maricopa Rd Maricopa, AZ 85239	15 Minute Drive Time

### **Sources and Methodology**

Household demand estimates are derived by combining data from the Consumer Expenditures Survey by the Bureau of Labor Statistics with current household demographic estimates from Claritas. The demand estimates only account for household expenditures. Demand is defined as the estimated dollar amount spent by a household that resides in the area of analysis for a specified retail store type or merchandise line item.

Supply estimates are generated from the Census of Retail Trade, a component of the Economic Census. County-level sales tax data is allocated to low levels of geography using business sales estimates, business locations, and employee counts provided by Claritas' Business Facts® database. Supply includes all products sold at retail outlets in a specified area for a one-year period. Supply is defined as the estimated total retail sales for a retail store type or merchandise line item.

Source: Retail Market Power™ (Claritas).

The background features abstract geometric shapes. On the left, there is a teal-colored shape that resembles a stylized house or a large arrow pointing upwards and to the right. To its right is a large, light yellow curved shape that also points towards the right. The text is centered over these shapes.

# **Appendix B:**

# **Demographic Report**





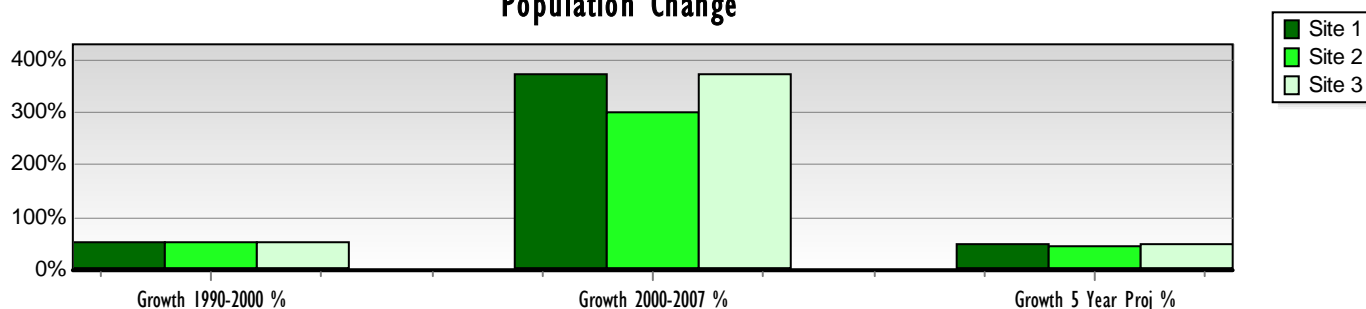
**Analysis Geography:** Maricopa, AZ  
15 - Minute Trade Area

**Date:** 12/5/2008

## Population Profile

	Site 1	Site 2	Site 3
2012 Projection	59,578	63,679	59,578
2007 Estimate	40,370	43,764	40,370
2000 Census	8,546	10,942	8,546
1990 Census	5,581	7,153	5,581

## Population Change



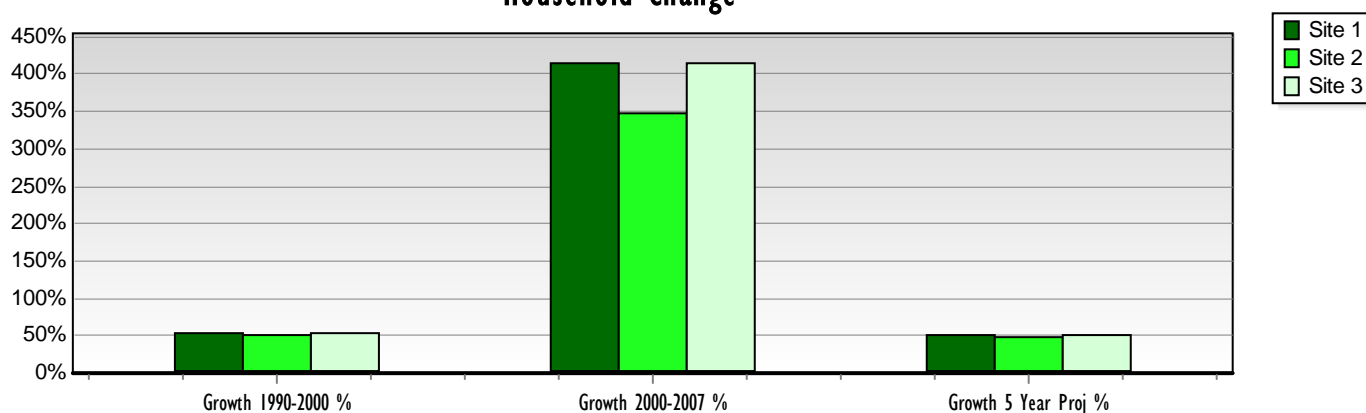
## Work Place Population

	Site 1	Site 2	Site 3
Total	6,746	6,804	6,746

## Household Profile

2012 Projection	20,466	21,502	20,466
2007 Estimate	13,619	14,481	13,619
2000 Census	2,647	3,228	2,647
1990 Census	1,720	2,124	1,720

## Household Change

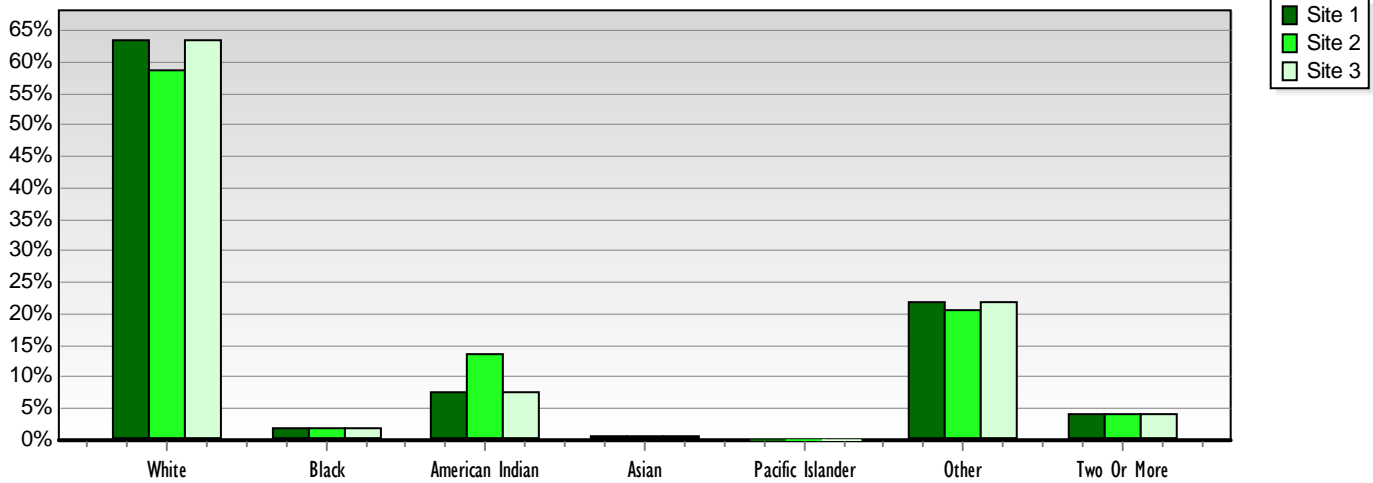


**Analysis Geography:** Maricopa, AZ  
15 - Minute Trade Area

**Date:** 12/5/2008

Population By Race (Current)	Site 1	Site 2	Site 3
White	25,622	25,761	25,622
Black	797	806	797
American Indian	3,092	6,005	3,092
Asian	296	296	296
Pacific Islander	37	41	37
Other	8,901	8,993	8,901
Two Or More	1,625	1,862	1,625
<b>Total Population By Race</b>	<b>40,370</b>	<b>43,764</b>	<b>40,370</b>

**Population By Race (Current)**



Population By Hispanic Origin (Current)	Site 1	Site 2	Site 3
Hispanic Origin	17,227	17,648	17,227
Non Hispanic Origin	23,143	26,116	23,143

**Analysis Geography:** Maricopa, AZ  
15 - Minute Trade Area

**Date:** 12/5/2008

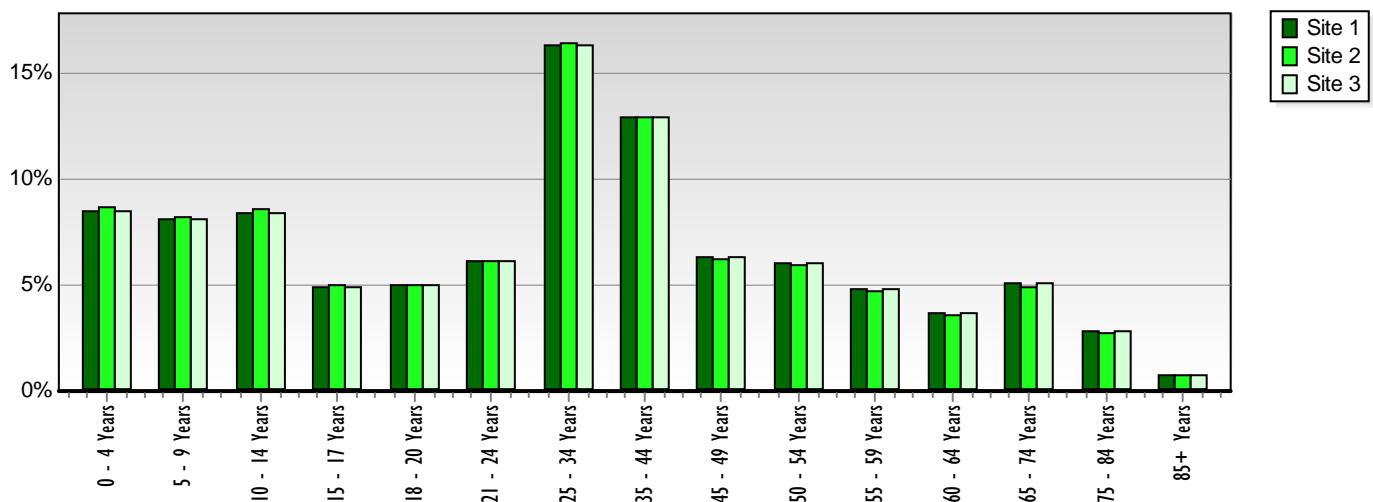
## Population By Age (Current)

	Site 1	Site 2	Site 3
0 to 4 years	3,444	3,792	3,444
5 to 9 years	3,265	3,614	3,265
10 to 14 years	3,386	3,775	3,386
15 to 17 years	1,967	2,202	1,967
18 to 20 years	2,018	2,180	2,018
21 to 24 years	2,476	2,672	2,476
25 to 34 years	6,608	7,192	6,608
35 to 44 years	5,217	5,649	5,217
45 to 49 years	2,556	2,737	2,556
50 to 54 years	2,449	2,607	2,449
55 to 59 years	1,956	2,087	1,956
60 to 64 years	1,501	1,578	1,501
65 to 74 years	2,057	2,139	2,057
75 to 84 years	1,160	1,217	1,160
85+ Years	310	323	310

## Total Population By Age

	<b>40,370</b>	<b>43,764</b>	<b>40,370</b>
Average Age	32.9	32.5	32.9
Median Age	30.4	30.0	30.4

## Population By Age (Current)

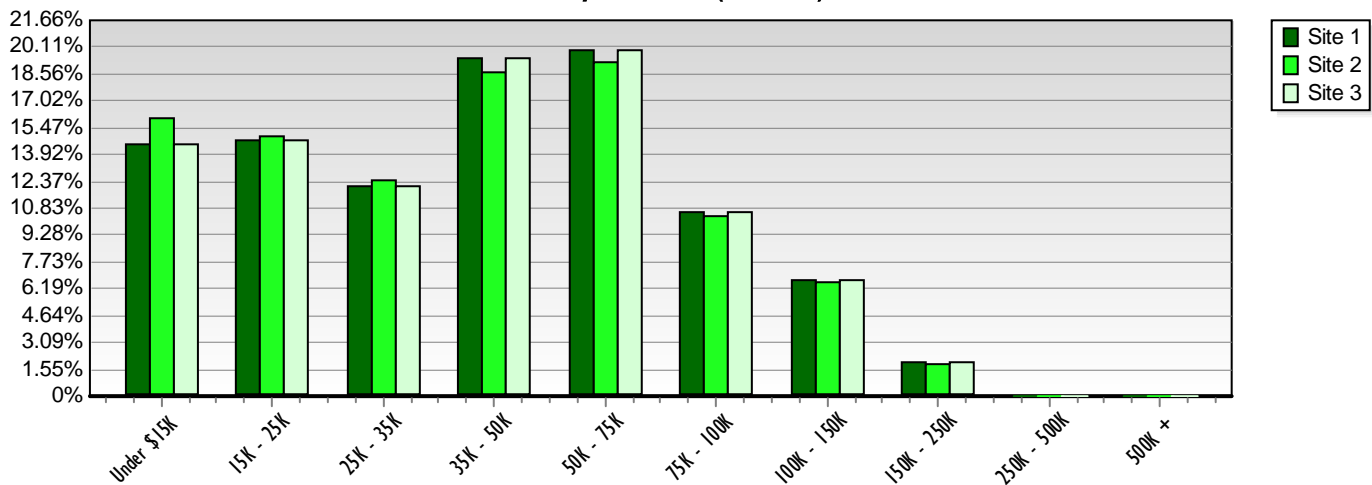


**Analysis Geography:** Maricopa, AZ  
15 - Minute Trade Area

**Date:** 12/5/2008

Households By Income (Current)	Site 1	Site 2	Site 3
Under \$15,000	1,974	2,319	1,974
\$15,000 to \$24,999	2,008	2,161	2,008
\$25,000 to \$34,999	1,655	1,798	1,655
\$35,000 to \$49,999	2,644	2,704	2,644
\$50,000 to \$74,999	2,714	2,792	2,714
\$75,000 to \$99,999	1,447	1,494	1,447
\$100,000 to \$149,999	910	944	910
\$150,000 to \$249,999	263	265	263
\$250,000 to \$499,999	4	4	4
\$500,000 +	0	0	0
<b>Total Households By Income</b>	<b>13,619</b>	<b>14,481</b>	<b>13,619</b>
Average Household Income	\$49,349	\$48,167	\$49,349
Per Capita Income	\$16,921	\$16,577	\$16,921
Median Household Income	\$41,326	\$40,111	\$41,326

**Households By Income (Current)**



**Analysis Geography:** Maricopa, AZ  
15 - Minute Trade Area

**Date:** 12/5/2008

## Housing Units By Occupancy (Current)

	Site 1	Site 2	Site 3
Owner - Occupied	58.2%	58.1%	58.2%
Renter - Occupied	26.6%	27.0%	26.6%
Vacant	15.2%	14.9%	15.2%

## Owner - Occupied Property Values (Current)

Under \$20,000	429	504	429
\$20,000 to \$39,999	472	567	472
\$40,000 to \$59,999	205	256	205
\$60,000 to \$79,999	350	406	350
\$80,000 to \$99,999	771	800	771
\$100,000 to \$149,999	1,345	1,478	1,345
\$150,000 to \$199,999	1,495	1,524	1,495
\$200,000 to \$299,999	2,955	2,984	2,955
\$300,000 to \$399,999	778	789	778
\$400,000 to \$499,999	253	263	253
\$500,000 to \$749,999	158	173	158
\$750,000 to \$999,999	58	58	58
\$1,000,000 +	72	84	72
<b>Total Owner - Occupied Property Values</b>	<b>9,341</b>	<b>9,886</b>	<b>9,341</b>
<b>Median Property Value</b>	<b>189,488</b>	<b>182,871</b>	<b>189,488</b>

## Owner - Occupied Property Values (Current)

